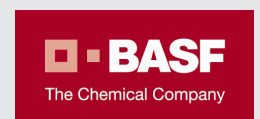




2022 INDUSTRY TRENDS

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National Pest Management Association/Pest Control Technology 2022 Industry Survey

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TABLE 001 page 1

Feelings About Future of Pest Management Business/Location

1. Given current economic conditions in the U.S. and Canada, how do you feel about the future of your pest management business or location over the next 2 years?

base: all respondents	430 100%
very optimistic	162 38%
somewhat optimistic	162 38%
neutral/don't know	62 14%
somewhat pessimistic	38 9%
very pessimistic	6 1%
no answer	0 0%

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TABLE 002 page 1

Economic Issues Impacting Pest Management Industry

2. In your opinion, which economic issues will impact the pest management industry in the next 2 years?

base: all respondents (multiple answers)	430 100%
customers cutting back on or eliminating service due to tighter budgets / money concerns	333 77%
fuel costs	317 74%
inflation	296 69%
labor shortage / hiring issues	228 53%
energy costs	170 40%
supply chain issues	169 39%
rising wages	144 33%
interest rates	125 29%
more regulations	124 29%
tight housing market	63 15%
entrance of mega player like Amazon to the industry / commoditization of service or distribution	53 12%
lack of product innovation	26 6%
other	10 2%
indicated at least one	426 99%
none	3 1%
no answer	1 0%

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TABLE 003 page 1

Operation Adjustments Due to Current Economic/Regulatory/Labor Issues: Service Operations

3. In terms of service operations, how is your company adjusting its business operations in the next six months given current economic, regulatory and labor issues?

base: all respondents (multiple answers)	430 100%
driving service vehicles longer/ extending their life	201 47%
cross training technicians to perform all job types	167 39%
limiting service area/only working in a specific geographic zone	154 36%
driving smaller, fuel-efficient cars or electric vehicles	105 24%
charging no-prep or no-show fees	79 18%
taking on all pest control jobs in my territory/being less selective	75 17%
developing more eco-friendly service protocols	66 15%
launching a premium service program that covers all pests (all-inclusive)	64 15%
only taking on recurring revenue accounts	51 12%
eliminating/paring down service offerings	41 10%
selling control products directly to customers (e.g., online store or retail counter)	20 5%
other	29 7%
indicated at least one	385 90%
none	41 10%
no answer	4 1%

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TABLE 004 page 1

Operation Adjustments Due to Current Economic/Regulatory/Labor Issues: Service Revenue

4. In terms of service revenue, how is your company adjusting its business operations in the next six months given current economic, regulatory and labor issues?

base: all respondents (multiple answers)	430 100%
raising prices to cover cost increases	297 69%
trying to collect money faster	205 48%
standardizing price increases / automatically raising prices annually or bi-yearly	135 31%
asking technicians to collect fees onsite	118 27%
not giving pricing discounts	108 25%
adding temporary fuel surcharge to invoices	41 10%
other	10 2%
indicated at least one	388 90%
none	39 9%
no answer	3 1%

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TABLE 005 page 1

Operation Adjustments Due to Current Economic/Regulatory/Labor Issues: Operations Overall

5. In terms of operations overall, how is your company adjusting its business operations in the next six months given current economic, regulatory and labor issues?

base: all respondents (multiple answers)	430 100%
analyzing data to improve processes and customer experience	219 51%
reducing or redirecting marketing dollars	131 30%
halting or trimming capital expenditures	118 27%
reducing overtime	81 19%
not opening new offices / branches	79 18%
not replacing workers who quit / retire	50 12%
reducing new hires	35 8%
replacing gas/diesel fleet with electric vehicles	19 4%
reducing or shrinking employee benefits	16 4%
installing solar panels	7 2%
other	18 4%
indicated at least one	356 83%
none	70 16%
no answer	4 1%

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TABLE 006 page 1

Biggest Workforce Concerns

6. Looking ahead, what are your biggest concerns relating to your workforce?

base: all respondents (multiple answers)	430 100%
hiring	223 52%
burnout	154 36%
people leaving for other jobs	135 31%
work-life balance	128 30%
quiet quitting (doing no more than what is expected/ 'coasting' at work)	118 27%
employees who resist using new technology	36 8%
overtime	35 8%
ensuring diversity, equity and inclusion	26 6%
complying with company vaccine mandates / vaccine hiring requirements	21 5%
employees who want better technology / are frustrated with current technology limitations	17 4%
people retiring early	17 4%
getting employees to come back to working in the office	12 3%
unionization	1 0%
other	18 4%
indicated at least one	357 83%
none	68 16%
no answer	5 1%

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TABLE 007 page 1

Employee Demographics: Race: Mean Summary

7. *Approximately what percentage of your company's employees (full and part-time) fall within each of the following race classifications?*

MEAN SUMMARY

base: those answering
(fill-in answers)

White	72.9%
Black/African American	6.4%
Asian	1.7%
American Indian or Alaska Native	0.7%
Native Hawaiian / Pacific Islander	0.6%
other race	7.3%
Mixed race (two or more races)	4.0%
don't know	6.4%
TOTAL =	100.0%

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TABLE 008 page 1

Employee Demographics: Race: White

7. Approximately what percentage of your company's employees (full and part-time) fall within each of the following race classifications?

WHITE

base: all respondents (fill-in answers)	430 100%
100%	173 40%
75% - 99%	81 19%
50% - 74%	62 14%
25% - 49%	16 4%
1% - 24%	16 4%
none	47 11%
mean:	72.9%
standard error:	1.79%
median:	90%
no answer	35 8%

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TABLE 009 page 1

Employee Demographics: Race: Black/African American

7. Approximately what percentage of your company's employees (full and part-time) fall within each of the following race classifications?

BLACK/AFRICAN AMERICAN

base: all respondents (fill-in answers)	430 100%
100%	3 1%
75% - 99%	3 1%
50% - 74%	6 1%
25% - 49%	27 6%
1% - 24%	73 17%
none	283 66%
mean:	6.4%
standard error:	0.78%
median:	0%
no answer	35 8%

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TABLE 010 page 1

Employee Demographics: Race: Asian

7. Approximately what percentage of your company's employees (full and part-time) fall within each of the following race classifications?

ASIAN

base: all respondents (fill-in answers)	430 100%
100%	2 0%
75% - 99%	1 0%
50% - 74%	2 0%
25% - 49%	5 1%
1% - 24%	13 3%
none	372 87%
mean:	1.7%
standard error:	0.50%
median:	0%
no answer	35 8%

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TABLE 011 page 1

Employee Demographics: Race: American Indian or Alaska Native

7. Approximately what percentage of your company's employees (full and part-time) fall within each of the following race classifications?

AMERICAN INDIAN OR ALASKA NATIVE

base: all respondents (fill-in answers)	430 100%
100%	0 0%
75% - 99%	0 0%
50% - 74%	2 0%
25% - 49%	3 1%
1% - 24%	14 3%
none	376 87%
mean:	0.7%
standard error:	0.23%
median:	0%
no answer	35 8%

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TABLE 012 page 1

Employee Demographics: Race: Native Hawaiian / Pacific Islander

7. Approximately what percentage of your company's employees (full and part-time) fall within each of the following race classifications?

NATIVE HAWAIIAN / PACIFIC ISLANDER

base: all respondents (fill-in answers)	430 100%
100%	0 0%
75% - 99%	0 0%
50% - 74%	1 0%
25% - 49%	2 0%
1% - 24%	9 2%
none	383 89%
mean:	0.6%
standard error:	0.21%
median:	0%
no answer	35 8%

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TABLE 013 page 1

Employee Demographics: Race: Other Race

7. Approximately what percentage of your company's employees (full and part-time) fall within each of the following race classifications?

OTHER RACE

base: all respondents (fill-in answers)	430 100%
100%	7 2%
75% - 99%	7 2%
50% - 74%	8 2%
25% - 49%	18 4%
1% - 24%	43 10%
none	312 73%
mean:	7.3%
standard error:	1.01%
median:	0%
no answer	35 8%

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TABLE 014 page 1

Employee Demographics: Race: Mixed Race

7. Approximately what percentage of your company's employees (full and part-time) fall within each of the following race classifications?

MIXED RACE (TWO OR MORE RACES)

base: all respondents (fill-in answers)	430 100%
100%	5 1%
75% - 99%	2 0%
50% - 74%	5 1%
25% - 49%	8 2%
1% - 24%	38 9%
none	337 78%
mean:	4.0%
standard error:	0.75%
median:	0%
no answer	35 8%

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TABLE 015 page 1

Employee Demographics: Race: Don't Know

7. Approximately what percentage of your company's employees (full and part-time) fall within each of the following race classifications?

DON'T KNOW

base: all respondents (fill-in answers)	430 100%
100%	24 6%
75% - 99%	0 0%
50% - 74%	0 0%
25% - 49%	2 0%
1% - 24%	5 1%
none	364 85%
mean:	6.4%
standard error:	1.21%
median:	0%
no answer	35 8%

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TABLE 016 page 1

Employee Demographics: Gender: Mean Summary

8. *Approximately what percentage of your company's employees (full and part-time) identify with each of these genders?*

MEAN SUMMARY

base: those answering
(fill-in answers)

male	74.5%
female	20.7%
transgender	0.1%
non-binary / no gender	0.3%
other	0.0%
don't know	4.4%
TOTAL =	100.0%

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TABLE 017 page 1

Employee Demographics: Gender: Male

8. Approximately what percentage of your company's employees (full and part-time) identify with each of these genders?

MALE

base: all respondents (fill-in answers)	430 100%
100%	111 26%
75% - 99%	145 34%
50% - 74%	118 27%
25% - 49%	5 1%
1% - 24%	1 0%
none	27 6%
mean:	74.5%
standard error:	1.31%
median:	80%
no answer	23 5%

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TABLE 018 page 1

Employee Demographics: Gender: Female

8. Approximately what percentage of your company's employees (full and part-time) identify with each of these genders?

FEMALE

base: all respondents (fill-in answers)	430 100%
100%	7 2%
75% - 99%	1 0%
50% - 74%	58 13%
25% - 49%	96 22%
1% - 24%	114 27%
none	131 30%
mean:	20.7%
standard error:	1.04%
median:	20%
no answer	23 5%

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TABLE 019 page 1

Employee Demographics: Gender: Transgender

8. Approximately what percentage of your company's employees (full and part-time) identify with each of these genders?

TRANSGENDER

base: all respondents (fill-in answers)	430 100%
100%	0 0%
75% - 99%	0 0%
50% - 74%	0 0%
25% - 49%	1 0%
1% - 24%	5 1%
none	401 93%
mean:	0.1%
standard error:	0.10%
median:	0%
no answer	23 5%

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TABLE 020 page 1

Employee Demographics: Gender: Non-Binary / No Gender

8. Approximately what percentage of your company's employees (full and part-time) identify with each of these genders?

NON-BINARY / NO GENDER

base: all respondents (fill-in answers)	430 100%
100%	1 0%
75% - 99%	0 0%
50% - 74%	0 0%
25% - 49%	0 0%
1% - 24%	1 0%
none	405 94%
mean:	0.3%
standard error:	0.25%
median:	0%
no answer	23 5%

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TABLE 021 page 1

Employee Demographics: Gender: Other

8. Approximately what percentage of your company's employees (full and part-time) identify with each of these genders?

OTHER

base: all respondents (fill-in answers)	430 100%
100%	0 0%
75% - 99%	0 0%
50% - 74%	0 0%
25% - 49%	0 0%
1% - 24%	1 0%
none	406 94%
mean:	0.0%
standard error:	0.00%
median:	0%
no answer	23 5%

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TABLE 022 page 1

Employee Demographics: Gender: Don't Know

8. Approximately what percentage of your company's employees (full and part-time) identify with each of these genders?

DON'T KNOW

base: all respondents (fill-in answers)	430 100%
100%	18 4%
75% - 99%	0 0%
50% - 74%	0 0%
25% - 49%	0 0%
1% - 24%	1 0%
none	388 90%
mean:	4.4%
standard error:	1.02%
median:	0%
no answer	23 5%

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TABLE 023 page 1

Employee Demographics: Age: Mean Summary

9. *Approximately what percentage of your company's employees (full and part-time) fall within each of the following age ranges?*

MEAN SUMMARY

base: those answering
(fill-in answers)

under 25	5.5%
25 - 34	19.2%
35 - 44	20.8%
45 - 54	19.7%
55 - 64	22.1%
65 or older	9.3%
don't know	3.5%
TOTAL =	100.0%

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TABLE 024 page 1

Employee Demographics: Age: Under 25

9. Approximately what percentage of your company's employees (full and part-time) fall within each of the following age ranges?

UNDER 25

base: all respondents (fill-in answers)	430 100%
100%	3 1%
75% - 99%	0 0%
50% - 74%	7 2%
25% - 49%	21 5%
1% - 24%	86 20%
none	288 67%
mean:	5.5%
standard error:	0.65%
median:	0%
no answer	25 6%

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TABLE 025 page 1

Employee Demographics: Age: 25 - 34

9. *Approximately what percentage of your company's employees (full and part-time) fall within each of the following age ranges?*

25 - 34

base: all respondents (fill-in answers)	430 100%
100%	11 3%
75% - 99%	8 2%
50% - 74%	51 12%
25% - 49%	72 17%
1% - 24%	63 15%
none	200 47%
mean:	19.2%
standard error:	1.28%
median:	5%
no answer	25 6%

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TABLE 026 page 1

Employee Demographics: Age: 35 - 44

9. *Approximately what percentage of your company's employees (full and part-time) fall within each of the following age ranges?*

35 - 44

base: all respondents (fill-in answers)	430 100%
100%	11 3%
75% - 99%	16 4%
50% - 74%	50 12%
25% - 49%	71 17%
1% - 24%	63 15%
none	194 45%
mean:	20.8%
standard error:	1.32%
median:	10%
no answer	25 6%

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TABLE 027 page 1

Employee Demographics: Age: 45 - 54

9. Approximately what percentage of your company's employees (full and part-time) fall within each of the following age ranges?

45 - 54

base: all respondents (fill-in answers)	430 100%
100%	20 5%
75% - 99%	7 2%
50% - 74%	51 12%
25% - 49%	50 12%
1% - 24%	76 18%
none	201 47%
mean:	19.7%
standard error:	1.39%
median:	2%
no answer	25 6%

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TABLE 028 page 1

Employee Demographics: Age: 55 - 64

9. Approximately what percentage of your company's employees (full and part-time) fall within each of the following age ranges?

55 - 64

base: all respondents (fill-in answers)	430 100%
100%	30 7%
75% - 99%	12 3%
50% - 74%	45 10%
25% - 49%	37 9%
1% - 24%	105 24%
none	176 41%
mean:	22.1%
standard error:	1.54%
median:	7%
no answer	25 6%

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TABLE 029 page 1

Employee Demographics: Age: 65 or Older

9. Approximately what percentage of your company's employees (full and part-time) fall within each of the following age ranges?

65 OR OLDER

base: all respondents (fill-in answers)	430 100%
100%	19 4%
75% - 99%	0 0%
50% - 74%	17 4%
25% - 49%	14 3%
1% - 24%	58 13%
none	297 69%
mean:	9.3%
standard error:	1.16%
median:	0%
no answer	25 6%

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TABLE 030 page 1

Employee Demographics: Age: Don't Know

9. Approximately what percentage of your company's employees (full and part-time) fall within each of the following age ranges?

DON'T KNOW

base: all respondents (fill-in answers)	430 100%
100%	14 3%
75% - 99%	0 0%
50% - 74%	0 0%
25% - 49%	0 0%
1% - 24%	0 0%
none	391 91%
mean:	3.5%
standard error:	0.91%
median:	0%
no answer	25 6%

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TABLE 031 page 1

Employee Demographics: Are Veterans

10. *Approximately what percentage of your company's employees (full and part-time) are veterans?*

base: all respondents (fill-in answers)	430 100%
100%	20 5%
75% - 99%	5 1%
50% - 74%	13 3%
25% - 49%	23 5%
1% - 24%	114 27%
none	239 56%
mean:	11.6%
standard error:	1.19%
median:	0%
no answer	16 4%

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TABLE 032 page 1

Employee Demographics: Have a Disability

11. *Approximately what percentage of your company's employees (full and part-time) have a disability?*

base: all respondents (fill-in answers)	430 100%
100%	9 2%
75% - 99%	2 0%
50% - 74%	10 2%
25% - 49%	8 2%
1% - 24%	54 13%
none	322 75%
mean:	5.6%
standard error:	0.88%
median:	0%
no answer	25 6%

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TABLE 033 page 1

Proportion Whose Workforce is More Diverse Now Than in 2018

12. Overall, is your company's workforce more diverse—along any dimension—now than it was in 2018 (4 years ago)?

base: all respondents	430 100%
yes	158 37%
no	201 47%
don't know	61 14%
no answer	10 2%

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TABLE 034 page 1

Proportion Whose Company Has Workforce Diversity as a Core Strategy

13. *Is workforce diversity a current core strategy in your company?*

base: all respondents	430 100%
YES:	157 37%
yes: it is a top priority	50 12%
yes: but it is not a top priority	107 25%
NO:	263 61%
no: but we are considering it within the next 3 years	26 6%
no: not at this time	237 55%
no answer	10 2%

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TABLE 035 page 1

Diversity of New Hires

14. Approximately what percent of your company's new hires in the past 2 years were not White?

base: all respondents (fill-in answers)	430 100%
100%	20 5%
75% - 99%	15 3%
50% - 74%	37 9%
25% - 49%	38 9%
1% - 24%	41 10%
none	175 41%
mean:	21.2%
standard error:	1.75%
median:	0%
don't know	81 19%
no answer	23 5%

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TABLE 036 page 1

Biggest Hiring Challenges

15. What are the biggest challenges your company has faced when hiring new employees within the last six months?

base: all respondents (multiple answers)	430 100%
finding people with the right character / work ethic	258 60%
ghosting / candidates not showing up for interviews	130 30%
finding people with the right pest management skill sets	128 30%
finding people with the right soft skill sets	110 26%
meeting or beating candidates' wage requirements / offers from other companies	82 19%
people leaving after only a week or two on the job / changing their minds	79 18%
finding people who will work outdoors	71 17%
knowing where to advertise to get in front of potential candidates	61 14%
meeting or beating benefits packages offered by other companies	57 13%
other	28 7%
indicated at least one	336 78%
none	87 20%
no answer	7 2%

National Pest Management Association/Pest Control Technology 2022 Industry Survey

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TABLE 037 page 1

Activities That Helped Attract and Hire Employees: Compensation-Related

16. Which compensation-related activities have helped your company attract and hire employees within the last six months?

base: all respondents (multiple answers)	430 100%
increased the starting wage	199 46%
improved benefits	82 19%
changed how employees are compensated so they realize earnings faster	81 19%
offered signing bonus	44 10%
offered immediate benefits / waiving wait times	37 9%
offered profit sharing plan	26 6%
shifted pay periods (i.e., from every two weeks to weekly, daily)	21 5%
offered ownership shares (ESOP, tradeable shares, stock options, restricted stock units, etc.)	12 3%
other	26 6%
indicated at least one	271 63%
none	144 33%
no answer	15 3%

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TABLE 038 page 1

Activities That Helped Attract and Hire Employees: Recruiting-Related

17. Which recruiting-related activities have helped your company attract and hire employees within the last six months?

base: all respondents (multiple answers)	430 100%
employee referral program / bonuses for employees who refer new hires	123 29%
posted jobs on online recruiting websites / platforms	106 25%
had candidates ride-along on route to learn about job first-hand	103 24%
posted jobs on social media	91 21%
improved the new-hire training process	76 18%
rewrote / changed the wording of job descriptions to appeal to more candidates	58 13%
improved the onboarding process	57 13%
promoted earnings potential and benefits in job postings	53 12%
encouraged walk-in interviews / applications at the office	44 10%
promoted flexible work / part time work in job postings	37 9%
hired or worked with full time recruiter(s)	29 7%
hosted or participated in job fairs	21 5%
posted jobs in print media (newspapers, newsletters, etc.)	17 4%
made sure ads emphasize the route/service area, not the branch office location	16 4%
posted jobs on broadcast media (radio, TV)	14 3%
other	11 3%
indicated at least one	244 57%

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TABLE 038 page 2

Activities That Helped Attract and Hire Employees: Recruiting-Related

17. Which recruiting-related activities have helped your company attract and hire employees within the last six months?

base: all respondents (multiple answers)	430 100%
none	177 41%
no answer	9 2%

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TABLE 039 page 1

Actions Industry Should Take to Reach Potential Hires

18. What actions should the industry take to reach more potential hires?

base: all respondents (multiple answers)	430 100%
network with community colleges	189 44%
network with local organizations to raise awareness of the professional trades	184 43%
develop registered apprentice programs	177 41%
develop social media campaigns promoting careers in the industry	166 39%
attend more high school career days	153 36%
expand NPMA Workforce development program efforts	125 29%
use photos of diverse employees on website career pages (women, veterans, people of color, etc.)	79 18%
network with four-year universities	77 18%
other	12 3%
indicated at least one	349 81%
none	71 17%
no answer	10 2%

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TABLE 040 page 1

Activities That Helped Employee Retention: Compensation-Related

19. Which compensation-related activities have helped your company retain employees within the last six months?

base: all respondents (multiple answers)	430 100%
increased pay rate for current employees	225 52%
added / expanded benefits	89 21%
mid-year raises or gave smaller raises throughout the year as specific goals were achieved	53 12%
profit sharing or pension plan	50 12%
retention bonus	44 10%
tenure-based incentives	43 10%
tuition reimbursement	24 6%
ownership shares (ESOP, tradeable shares, stock options, restricted stock units, etc.)	13 3%
encouraging customers to tip their technicians	11 3%
other	31 7%
indicated at least one	299 70%
none	122 28%
no answer	9 2%

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TABLE 041 page 1

Activities That Helped Employee Retention: Employee-Focused

20. Which employee-focused activities have helped your company retain employees within the last six months?

base: all respondents (multiple answers)	430 100%
better communication with employees	226 53%
recognized employees who achieved specific goals	153 36%
engaged employees to improve processes / to identify and eliminate workplace aggravations	139 32%
hosted team / culture-building and appreciation events and activities	98 23%
employee satisfaction surveys	52 12%
other	21 5%
indicated at least one	308 72%
none	113 26%
no answer	9 2%

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TABLE 042 page 1

Activities That Helped Employee Retention: Job-Related

21. Which job-related activities have helped your company attract and retain employees within the last six months?

base: all respondents (multiple answers)	430 100%
offered greater work schedule flexibility	113 26%
reduced or eliminated weekend work	98 23%
conducted sales training to help technicians increase earning potential	91 21%
improved technical training using technology, social media, short digestible segments	83 19%
reduced 'after hours' / late-day work on weekdays	76 18%
changed job titles to be more professional (e.g., technician or representative to specialist)	63 15%
offered management / leadership / next-job-up training	58 13%
offered a clear path to career advancement	54 13%
instituted a 4-day work week	33 8%
other	13 3%
indicated at least one	284 66%
none	132 31%
no answer	14 3%

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TABLE 043 page 1

Activities Undertaken to Boost Productivity/Efficiency: Service-Focused

22. Which service-focused activities has your company undertaken in the last 3 years to boost productivity and efficiency?

base: all respondents (multiple answers)	430 100%
optimized routes	233 54%
used mobile technology in the field	175 41%
increased route density	155 36%
increased employee incentives and bonuses	137 32%
automated repetitive tasks (e.g., data entry for technicians)	111 26%
sold / bundled more services per stop so each stop generates higher revenue	106 25%
reduced the number of products used / carried in service vehicles	58 13%
hired seasonal employees	52 12%
standardized service regimens	51 12%
tracked pest activity / using data to forecast and take preventive measures the following year	50 12%
used remote electric monitoring devices	42 10%
packaged reservices with paying stops / not providing immediate reservice	34 8%
reduced service frequency (e.g., triannual vs quarterly service)	34 8%
spent less facetime with customers	22 5%
other	6 1%
indicated at least one	365 85%
none	58 13%

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TABLE 043 page 2

Activities Undertaken to Boost Productivity/Efficiency: Service-Focused

22. Which service-focused activities has your company undertaken in the last 3 years to boost productivity and efficiency?

base: all respondents (multiple answers)	430 100%
no answer	7 2%

National Pest Management Association/Pest Control Technology 2022 Industry Survey

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TABLE 044 page 1

Activities Undertaken to Boost Productivity/Efficiency: Operations-/Office-Focused

23. Which operations- or office-focused activities has your company undertaken in the last 3 years to boost productivity and efficiency?

base: all respondents (multiple answers)	430 100%
improved communication with employees and customers	173 40%
improved internal systems / processes / procedures	149 35%
added / expanded employee training	147 34%
upgraded operations software / technology	126 29%
increased employee incentives and bonuses	115 27%
adjusted technician schedules and stops in real time	101 23%
went paperless	95 22%
automated managerial and office tasks (e.g., scheduling, accounts payable, etc.)	93 22%
improved tracking of advertising spending / ROI	71 17%
measured key performance indicators (KPIs) / scorecards	65 15%
built referral networks with companies in complementary industries	54 13%
reduced steps to the sale / improved the customer sales journey	42 10%
used sales scripts to improve lead conversion	30 7%
complementary industries	12 3%
other	4 1%
indicated at least one	335 78%
none	81 19%
no answer	14 3%

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TABLE 045 page 1

Planned Implementation of Technologies to Improve Efficiency/Productivity

24. In the next 5 years, which technologies does your company plan to implement in hopes to improve efficiency and productivity at your company?

base: all respondents (multiple answers)	430 100%
pesticides with broader labels, longer residual	223 52%
electronic pest monitoring devices	119 28%
more environmentally friendly pesticides	117 27%
training using interactive virtual reality	100 23%
data protection / cybersecurity software	91 21%
biological pesticides	87 20%
data analytics / Artificial Intelligence (e.g., to improve customer service, sales processes)	82 19%
drones	58 13%
robots / tools that incorporate robotics	18 4%
other	17 4%
indicated at least one	344 80%
none	76 18%
no answer	10 2%

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TABLE 046 page 1

Expectations For Pace of Merger and Acquisition (M&A) Activity in Industry

25. In the next 5 years, what is your expectation for the pace of merger and acquisition activity in the pest management industry?

base: all respondents	430 100%
It will increase	252 59%
It will remain the same	133 31%
It will decrease	35 8%
no answer	10 2%

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TABLE 047 page 1

Agreement with Statements Related to M&A Activity in Industry: Agree Summary

26. What is your level of agreement with each of the following statements related to M&A activity in the pest management industry in the next 5 years?

AGREE SUMMARY

(rated +1 or +2 on a 5-point scale where +2 = strongly agree and -2 = strongly disagree)

base: all respondents	430 100%
High inflation and interest rates will negatively impact M&A transactions.	268 62%
Buyers see the value of the industry's recurring revenue model and economic resilience; this will positively impact M&A activity.	219 51%
More private equity will enter the market.	212 49%
Distribution and manufacturing will become a bigger target of M&A activity.	202 47%
Lower transaction multiples / lower valuations will negatively impact M&A transactions.	143 33%
Buyers have ready reserves of cash and need to spend it; this will positively impact M&A activity.	122 28%
indicated at least one	368 86%
indicated none	62 14%

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TABLE 048 page 1

Agreement with Statements Related to M&A Activity in Industry: Disagree Summary

26. What is your level of agreement with each of the following statements related to M&A activity in the pest management industry in the next 5 years?

DISAGREE SUMMARY

(rated -1 or -2 on a 5-point scale where +2 = strongly agree and -2 = strongly disagree)

base: all respondents	430 100%
Buyers have ready reserves of cash and need to spend it; this will positively impact M&A activity.	118 27%
Lower transaction multiples / lower valuations will negatively impact M&A transactions.	52 12%
Buyers see the value of the industry's recurring revenue model and economic resilience; this will positively impact M&A activity.	50 12%
High inflation and interest rates will negatively impact M&A transactions.	48 11%
More private equity will enter the market.	41 10%
Distribution and manufacturing will become a bigger target of M&A activity.	37 9%
indicated at least one	204 47%
indicated none	226 53%

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TABLE 049 page 1

Agreement with Statements Related to M&A Activity in Industry: More Private Equity Will Enter the Market.

26. What is your level of agreement with each of the following statements related to M&A activity in the pest management industry in the next 5 years?

MORE PRIVATE EQUITY WILL ENTER THE MARKET.

base: all respondents	430 100%
+2 - strongly agree	85 20%
+1	127 30%
0	152 35%
-1	25 6%
-2 - strongly disagree	16 4%
mean:	0.6
standard error:	0.05
TOP 2	212 49%
BOTTOM 2	41 10%
no answer	25 6%

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TABLE 050 page 1

Agreement with Statements Related to M&A Activity in Industry: Distribution and Manufacturing Will Become a Bigger Target of M&A Activity.

26. What is your level of agreement with each of the following statements related to M&A activity in the pest management industry in the next 5 years?

DISTRIBUTION AND MANUFACTURING
WILL BECOME A BIGGER TARGET OF
M&A ACTIVITY.

base: all respondents	430 100%
+2 - strongly agree	43 10%
+1	159 37%
0	162 38%
-1	27 6%
-2 - strongly disagree	10 2%
mean:	0.5
standard error:	0.04
TOP 2	202 47%
BOTTOM 2	37 9%
no answer	29 7%

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TABLE 051 page 1

Agreement with Statements Related to M&A Activity in Industry: Lower Transaction Multiples / Lower Valuations Will Negatively Impact M&A Transactions.

26. What is your level of agreement with each of the following statements related to M&A activity in the pest management industry in the next 5 years?

LOWER TRANSACTION MULTIPLES /
LOWER VALUATIONS WILL NEGATIVELY
IMPACT M&A TRANSACTIONS.

base: all respondents	430 100%
+2 - strongly agree	30 7%
+1	113 26%
0	207 48%
-1	45 10%
-2 - strongly disagree	7 2%
mean:	0.3
standard error:	0.04
TOP 2	143 33%
BOTTOM 2	52 12%
no answer	28 7%

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TABLE 052 page 1

Agreement with Statements Related to M&A Activity in Industry: High Inflation and Interest Rates Will Negatively Impact M&A Transactions.

26. What is your level of agreement with each of the following statements related to M&A activity in the pest management industry in the next 5 years?

HIGH INFLATION AND INTEREST
RATES WILL NEGATIVELY IMPACT M&A
TRANSACTIONS.

base: all respondents	430 100%
+2 - strongly agree	117 27%
+1	151 35%
0	94 22%
-1	34 8%
-2 - strongly disagree	14 3%
mean:	0.8
standard error:	0.05
TOP 2	268 62%
BOTTOM 2	48 11%
no answer	20 5%

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TABLE 053 page 1

Agreement with Statements Related to M&A Activity in Industry: Buyers Have Ready Reserves of Cash and Need to Spend It; This Will Positively Impact M&A Activity.

26. What is your level of agreement with each of the following statements related to M&A activity in the pest management industry in the next 5 years?

BUYERS HAVE READY RESERVES OF CASH AND NEED TO SPEND IT; THIS WILL POSITIVELY IMPACT M&A ACTIVITY.

base: all respondents	430 100%
+2 - strongly agree	29 7%
+1	93 22%
0	166 39%
-1	82 19%
-2 - strongly disagree	36 8%
mean:	0.0
standard error:	0.05
TOP 2	122 28%
BOTTOM 2	118 27%
no answer	24 6%

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TABLE 054 page 1

Agreement with Statements Related to M&A Activity in Industry: Buyers See the Value of the Industry's Recurring Revenue Model and Economic Resilience; This Will Positively Impact M&A Activity.

26. What is your level of agreement with each of the following statements related to M&A activity in the pest management industry in the next 5 years?

BUYERS SEE THE VALUE OF THE
INDUSTRY'S RECURRING REVENUE
MODEL AND ECONOMIC RESILIENCE;
THIS WILL POSITIVELY IMPACT M&A
ACTIVITY.

base: all respondents	430 100%
+2 - strongly agree	78 18%
+1	141 33%
0	138 32%
-1	36 8%
-2 - strongly disagree	14 3%
mean:	0.6
standard error:	0.05
TOP 2	219 51%
BOTTOM 2	50 12%
no answer	23 5%

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TABLE 055 page 1

Importance of Company Embracing Sustainability

27. How important is it for your company to embrace sustainability?

base: all respondents	430 100%
5 - very important	195 45%
4	112 26%
3	75 17%
2	19 4%
1 - not at all important	24 6%
mean:	4.0
standard error:	0.06
TOP 2	307 71%
no answer	5 1%

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TABLE 056 page 1

Actions Taken Relating To Sustainability: Past 3 Years

28. *What actions relating to sustainability has your company undertaken in the past 3 years?*

base: all respondents (multiple answers)	430 100%
used target pest-specific chemical control products	204 47%
embraced non-chemical control practices / using mechanical devices, exclusion, etc.	184 43%
drove more fuel efficient vehicles	163 38%
used eco-friendly, natural or organic chemical control products	147 34%
conserved water use	105 24%
used 25b EPA exempt control products	70 16%
drove hybrid fuel vehicles	36 8%
used alternative energy technologies – solar, etc.	14 3%
drove electric vehicles	10 2%
acquired carbon credits	5 1%
other	6 1%
indicated at least one	352 82%
none	69 16%
no answer	9 2%

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TABLE 057 page 1

Actions Taken Relating To Sustainability: Next 3 Years

29. What actions relating to sustainability does your company plan to undertake in the next 3 years?

base: all respondents (multiple answers)	430 100%
using target pest-specific chemical control products	180 42%
driving more fuel efficient vehicles	159 37%
embracing non-chemical control practices / using mechanical devices, exclusion, etc.	139 32%
using eco-friendly, natural or organic chemical control products	126 29%
driving hybrid fuel vehicles	84 20%
conserving water use	71 17%
using 25b EPA exempt control products	56 13%
driving electric vehicles	49 11%
using alternative energy technologies – solar, etc.	33 8%
acquiring carbon credits	5 1%
other	14 3%
indicated at least one	328 76%
none	88 20%
no answer	14 3%

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TABLE 058 page 1

Typical Customer Communication Methods

30. How does your company typically communicate with customers?

base: all respondents (multiple answers)	430 100%
phone	372 87%
email	344 80%
text / SMS	319 74%
face to face	290 67%
letter / mail	112 26%
chat box on website / messaging app	73 17%
postcards / direct mail	70 16%
flyers	32 7%
fax	19 4%
other	4 1%
indicated at least one	424 99%
no answer	6 1%

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TABLE 059 page 1

Expected Primary Customer Communication Method

31. What do you expect will be your company's primary form of communication with customers in the next 3 years?

base: all respondents	430 100%
text / SMS	183 43%
phone	107 25%
email	82 19%
face to face	31 7%
chat box on website / messaging app	17 4%
letter / mail	3 1%
flyers	2 0%
postcards / direct mail	2 0%
fax	0 0%
other	2 0%
no answer	1 0%

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TABLE 060 page 1

Current Use of Text/SMS to Communicate With Customers

32. How is your company currently using texting / SMS to communicate with customers?

base: all respondents (multiple answers)	430 100%
sending appointment reminders	255 59%
responding to service requests	251 58%
answering service questions	246 57%
setting up appointments	235 55%
sending appointment updates	191 44%
quoting jobs	138 32%
general communications (e.g., pest news, newsletters, specials, promotions)	133 31%
collecting and processing payment	130 30%
sending links to invoices	93 22%
soliciting reviews	81 19%
other	10 2%
indicated at least one	382 89%
company does not text customers	39 9%
no answer	9 2%

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TABLE 061 page 1

Actions Taken to Improve Customer Retention

33. Which actions is your company taking to improve customer retention?

base: all respondents (multiple answers)	430 100%
improving communication / increasing number of 'touches' with customers	237 55%
bundling services / selling more services per stop	192 45%
doing extra / value-added tasks around the house like bring up trashcans, etc.	176 41%
surveying customers on their satisfaction after service	157 37%
sharing photos / video of customer pest issues and post-treatment resolution	115 27%
starting customer loyalty program	42 10%
lowering prices	18 4%
other	14 3%
indicated at least one	374 87%
none	48 11%
no answer	8 2%

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TABLE 062 page 1

Consumer Trends/Issues That Will Impact Business

34. In your opinion, which consumer trends / issues will impact your business in the next 3 years?

base: all respondents (multiple answers)	430 100%
paying for service via digital wallet app (Apple Pay, Google pay, Zelle, Cash App, Venmo, etc)	216 50%
anti-pesticide sentiment	160 37%
continuation of remote work / hybrid work for many customers	100 23%
interest in connected devices / Internet of Things (e.g., electronic remote pest monitoring)	94 22%
return to travel post pandemic	73 17%
voice commerce – shopping for service through devices like Amazon Echo, Google Assistant	69 16%
return to dining out post pandemic	66 15%
movement to 'natural' lawns / replacing lawns with plants / No Mow Movement	33 8%
other	8 2%
indicated at least one	361 84%
none	55 13%
no answer	14 3%

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TABLE 063 page 1

Advertising: Paid Types Most Effective/Offer Greatest ROI

35. Which types of paid (that is, not free) advertising does your company find most effective and offer the greatest return on investment?

base: all respondents (multiple answers)	430 100%
digital: company website	196 46%
digital: SEO / search engine rankings	169 39%
service vehicle graphics	137 32%
digital: social media ads	130 30%
digital: pay per click ads	77 18%
sponsoring community youth sports, festivals, fundraisers, etc.	72 17%
flyers / brochures / cloverleafing	62 14%
yard signs	61 14%
direct mail	50 12%
paying cash, gift card or offering service discount for customer referrals	49 11%
digital: banner ads	44 10%
print	38 9%
direct to door / door to door sales	37 9%
radio	37 9%
billboards	32 7%
TV	30 7%
other	20 5%
NET: DIGITAL:	270 63%

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TABLE 063 page 2

Advertising: Paid Types Most Effective/Offer Greatest ROI

35. Which types of paid (that is, not free) advertising does your company find most effective and offer the greatest return on investment?

base: all respondents (multiple answers)	430 100%
indicated at least one	350 81%
company does not use paid advertising to promote our services	73 17%
no answer	7 2%

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TABLE 064 page 1

Advertising: Biggest Impediment to Digital Advertising

36. What is the biggest impediment to digital advertising for your company?

base: all respondents	430 100%
too expensive	105 24%
don't trust the reporting metrics / not convinced they're accurate (e.g., # impressions, click throughs)	54 13%
difficult to identify the right target audience	47 11%
don't have time to learn / master this form of advertising	40 9%
hard to secure keywords in a competitive market	28 7%
my customers are not active online	9 2%
other	24 6%
no impediments	112 26%
no answer	11 3%

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TABLE 065 page 1

Average Cost of Digital Sales Lead

37. What is the average cost of a digital sales lead (from paid digital advertising like pay per click ads or Facebook) for your company?

base: all respondents	430 100%
\$141 or more	11 3%
\$131 - \$140	3 1%
\$121 - \$130	6 1%
\$111 - \$120	0 0%
\$101 - \$110	13 3%
\$91 - \$100	8 2%
\$81 - \$90	4 1%
\$71 - \$80	8 2%
\$61 - \$70	7 2%
\$51 - \$60	16 4%
\$41 - \$50	17 4%
\$31 - \$40	20 5%
\$21 - \$30	27 6%
\$11 - \$20	26 6%
\$1 - \$10	32 7%
mean:	\$50.3
standard error:	\$2.92
median:	\$38
company does not use digital advertising	155 36%
no answer	77 18%

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TABLE 066 page 1

Percentage of Revenue Dedicated to Advertising

38. What percentage of your company's revenue is dedicated to advertising?

base: all respondents	430 100%
More than 10%	32 7%
9% - 10%	52 12%
7% - 8%	31 7%
5% - 6%	57 13%
3% - 4%	78 18%
1% - 2%	77 18%
0%	94 22%
mean:	4.5%
standard error:	0.18%
median:	4%
no answer	9 2%

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TABLE 067 page 1

Social Media Platforms Where Company is Active

39. On which social media platforms is your pest control company (not you personally) active?

base: all respondents (multiple answers)	430 100%
Facebook	310 72%
LinkedIn	122 28%
Instagram	109 25%
YouTube	72 17%
Twitter	44 10%
TikTok	32 7%
WhatsApp	17 4%
Pinterest	13 3%
SnapChat	12 3%
Redditt	9 2%
other	35 8%
indicated at least one	348 81%
company does not have social media presence	76 18%
no answer	6 1%

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TABLE 068 page 1

Regulatory Issues That Will Have Most Impact on Industry

40. In the next 5 years, which regulatory related issues do you think will have the most impact on the pest management industry?

base: all respondents (multiple answers)	430 100%
anti-pesticide legislation in general	265 62%
anti-rodenticide legislation	208 48%
increased state and local regulations	163 38%
product restrictions / loss due to EPA reevaluations	150 35%
anti-pesticide legislation specifically due to increased backyard mosquito control applications	107 25%
greater licensing requirements	104 24%
policies stemming from climate change legislation	102 24%
state bans on the sale of gasoline-powered vehicles and equipment	102 24%
federal pre-emption legislation	62 14%
standardizing licensing requirements across states / establishing a national standard	61 14%
policies stemming from the Endangered Species Act	60 14%
policies stemming from the Clean Water Act	57 13%
other	13 3%
indicated at least one	393 91%
none	31 7%
no answer	6 1%

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TABLE 069 page 1

Proportion Who Take an Active Role Advocating for the Industry With Elected/Regulatory Officials

41. Do you or does your company take an active role in advocating for the industry with elected and regulatory officials in your city, state or nationally?

base: all respondents	430 100%
yes	163 38%
no	261 61%
no answer	6 1%

National Pest Management Association/Pest Control Technology 2022 Industry Survey

Topline Results 11/07/22

TABLE 070 page 1

"Professional Success" Meaning

42. What does "professional success" mean to you?

base: all respondents (multiple answers)	430 100%
enjoying work on a daily basis	328 76%
financial success	316 73%
making a difference	302 70%
working with a good team in a good environment	267 62%
passion for the work	266 62%
ongoing learning and development	264 61%
respect from others	253 59%
individual achievement	213 50%
organizational achievement	174 40%
other	12 3%
indicated at least one	429 100%
no answer	1 0%

National Pest Management Association/Pest Control Technology 2022 Industry Survey

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TABLE 071 page 1

"Personal Success" Meaning

43. What does "personal success" mean to you?

base: all respondents (multiple answers)	430 100%
happiness/enjoyment	321 75%
rewarding relationships (family, community, etc.)	306 71%
work/life balance	291 68%
financial success	281 65%
a life of meaning/feeling no regrets	262 61%
learning and developing (new experiences and personal growth)	255 59%
other	12 3%
indicated at least one	426 99%
no answer	4 1%

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TABLE 072 page 1

Geographic Distribution [Appended From List]

base: all respondents	430 100%
NORTHEAST:	
New England (CT, MA, ME, NH, RI, VT)	22 5%
Middle Atlantic (NJ, NY, PA)	53 12%
MIDWEST:	
East North Central (IL, IN, MI, OH, WI)	47 11%
West North Central (IA, KS, MN, MO, NE, ND, SD)	26 6%
SOUTH:	
South Atlantic (DC, DE, FL, GA, MD, NC, PR/VI, SC, VA, WV)	99 23%
East South Central (AL, KY, MS, TN)	23 5%
West South Central (AR, LA, OK, TX)	57 13%
WEST:	
Mountain (AZ, CO, ID, MT, NM, NV, UT, WY)	32 7%
Pacific (AK, CA, HI, OR, WA)	45 10%
Canada	26 6%