

2017 Pest Control Industry Report



TEXT ANALYSIS OF NET PROMOTER SCORE SURVEYS

PROJECT GOALS

The primary project goal is to determine the key drivers, barriers, and delighters of the Net Promoter Score (NPS) rating for the Pest Control Industry for 2017. A secondary goal is to compare the 2017 research findings to those in the 2015 benchmark report and identify any changes over the past two years.

METHODOLOGY

Open-ended text provided by NPS survey respondents was analyzed. 14 Listen360 client brands within the Pest Control Industry were randomly selected using a two-step sampling approach:

- 23 client brands (US-based only) were categorized by business size into either 'large' or 'small/mid-size' companies, and a random sample of 14 brands was selected that matched the distribution of business size as closely as possible.
- From each brand, a random sample of 135 NPS survey responses was selected, resulting in a final sample of 1,890 NPS survey responses.

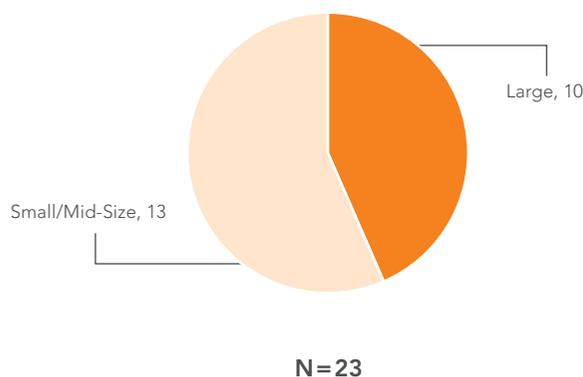
The random sample of NPS survey responses for each brand was selected from a six month period between the dates of October 1, 2016 and March 31, 2017.

- Margin of Error at 95% confidence for the total sample is +/- 2.2%.

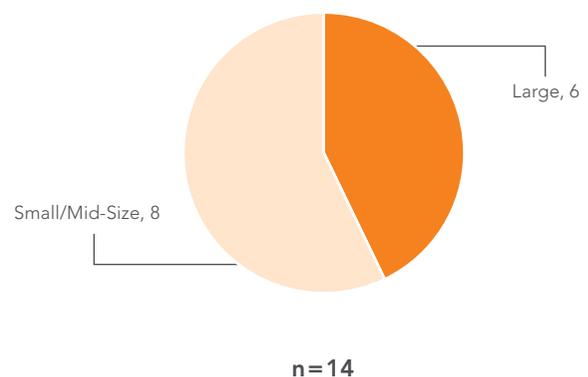
METHODOLOGY: SAMPLING BY BUSINESS SIZE

The sample matches the population distribution of business size as closely as possible.

Population Distribution by Business Size



Sample Distribution by Business Size



ANALYTICAL APPROACH

Touchpoints and Attributes were coded and analyzed to identify which of them were Barriers, Key Drivers, and Delighters of loyalty (NPS).

STEP 1: CODING THE TEXT DATA

- **Touchpoints** are the places or processes where customers interact with the brand, e.g., "the facility."
- **Attributes** are the qualities or characteristics of the experience, e.g., "clean/tidy."
- Touchpoints and attributes work together to create an attitude or emotion about the brand, which in turn drives consumer behavior in the form of **loyalty**...in our case, how likely they are to recommend the brand.
- **Positive** and **Negative** sentiment of each touchpoint and attribute were coded separately, e.g., "clean/tidy" and "dirty/untidy."

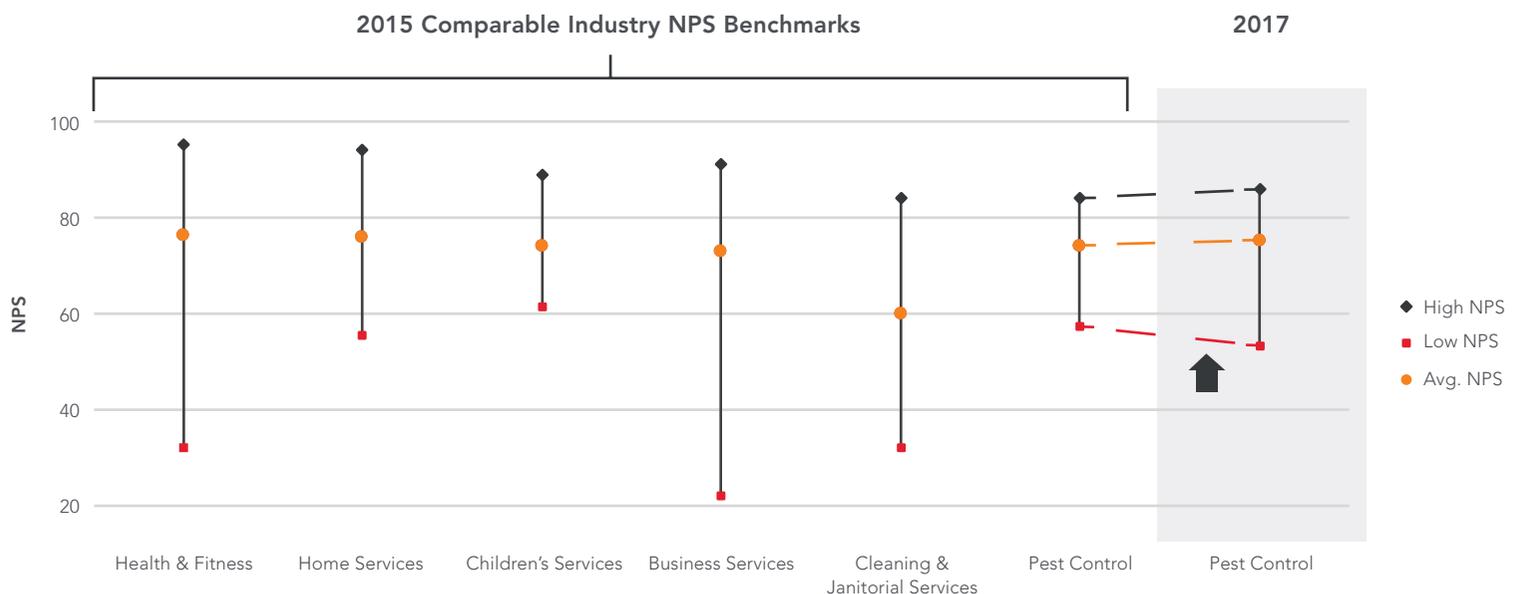
STEP 2: ANALYZE SENTIMENT BY LOYALTY

- **Barriers** are minimal expectations that dissatisfy when performed poorly, with no effect if performed well.
- **Delighters** are "wow factors" that drive loyalty up when performed well, with no effect if performed poorly.
- **Key Drivers** work both ways: decreasing loyalty when performed poorly and increasing loyalty when performed well.

% Mentions By...	Detractors	Passives	Promoters	Detractors	Passives	Promoters
Barrier	●	●	●	—	—	—
Delighter	—	—	—	●	●	●
Key Driver	●	●	●	●	●	●
	Negative Sentiment			Positive Sentiment		

RANGE OF NET PROMOTER SCORES (NPS) ACROSS INDUSTRIES

On average, the NPS for the Pest Control Industry has not changed significantly since 2015. However, a slight decrease in the bottom of the range may indicate a decline in customer experience for some companies within this industry.



THE ABILITY OF THE SERVICE TO ACHIEVE RESULTS IS KEY TO NPS

Also critical to the experience is that the service provider is efficient with time and is thorough.

Barriers	Key Drivers (in order of importance)	Delighters
1. Booking/Scheduling Process	1. Ability to Achieve Results	1. Friendliness
2. Communication Ability	2. The Service Provided	2. The Employees/Staff
3. Listen to/Understand Customer Needs	3. The Service Provider (Technician/Inspector)	3. Experience/Knowledgeable
4. Deliver on Promises	4. Efficient with Time	4. Helpfulness
5. Consistency/Continuity	5. Thoroughness	5. Product/Materials
6. Convenience	6. Value/Price	
7. Honesty	7. Professionalism	
8. Competence/Accuracy	8. Politeness	
9. Trustworthiness	9. Reliability/Dependability	
	10. Notification of Visit	
	11. Responsiveness	
	12. Level of Customer Service	
	13. Issue Resolution	
	14. Ability to Explain	
	15. Ease of Use	
	16. Ability to Accommodate	

Touchpoints/attributes must be mentioned by 15 or more respondents to be included in the analysis. Barriers, Key Drivers, and Delighters are determined from the statistical comparison of Detractors, Passives, and Promoters at 95% confidence level. Barriers negatively affect NPS when performed poorly or are absent, but do not drive it to increase when performed well. Key Drivers negatively affect NPS when performed poorly or are absent, AND drive NPS up when performed well. Delighters increase NPS when performed well, but do not negatively affect NPS if absent or performed poorly.

BOOKING/SCHEDULING PROCESS, COMMUNICATION ABILITY, CONVENIENCE, AND COMPETENCE/ACCURACY CONTINUE TO BE BARRIERS IN 2017

A number of new barriers have emerged in 2017, leading to potentially higher levels of dissatisfaction.

Tips for Preventing Dissatisfaction

Communicate better with the customer when scheduling to ensure you are listening to their needs and providing a convenient service.

Follow through on any promises made to the customer—especially promises made with regards to scheduling or customer requests.

“You do not call to schedule the appointments even though you said you would so I am never home to talk with the representative.”

“The service is inconsistent. My specific requests are not consistently met resulting on my follow up calls to get another service call.”

Barriers	
2015	2017
Booking/Scheduling Process	Booking/Scheduling Process
Value/Price	Communication Ability
Communication Ability	Convenience
Convenience	Competence/Accuracy
Competence/Accuracy	Listen to/Understand Customer Needs
Ability to Accommodate	Deliver on Promises
	Consistency/Continuity
	Honesty
	Trustworthiness

New Barriers in 2017

THE STRONGEST KEY DRIVERS REMAIN THE SAME AS IN 2015, HOWEVER SOME DRIVERS OF LOYALTY HAVE CHANGED

Compared to 2015, in 2017...

- Not being polite or not being able to explain will drive down customer loyalty, as these attributes are no longer Delighters.
- Both demonstrating a better value/price and your ability to accommodate can now drive up loyalty, as these attributes have shifted from Barriers to Key Drivers.
- A new key driver, related to booking/scheduling, has emerged: Notification of Visit.

Key Drivers	
2015	2017
The Service Provided	Ability to Achieve Results
The Service Provider (Tech/Inspector)	The Service Provided
The Employees/Staff	The Service Provider (Tech/Inspector)
Efficient with Time	Efficient with Time
Ability to Achieve Results	Thoroughness
Professionalism	Professionalism
Experience/Knowledge	Reliability/Dependability
Reliability/Dependability	Responsiveness
Responsiveness	Level of Customer Service
Issue Resolution	Issue Resolution
Thoroughness	Ease of Use
Level of Customer Service	Politeness
Listen to/Understand Customer Needs	Ability to Explain
Ease of Use	Value/Price
	Ability to Accommodate
	Notification of Visit

"I like that I receive a call the day before the service person is scheduled. This way I can be sure to be home."

"No call in advance. All I received was a phone call after saying the service could not be completed because my dogs were out."

These were Delighters in 2015

These were Barriers in 2015

New Key Driver in 2017

Tips for Delighting Customers

Encourage employees and staff (technicians and office staff) to engage in friendly, helpful conversations with customers.

Make it a goal to reduce customer anxiety by demonstrating your company’s knowledge and experience at effectively solving pest problems.

Delight customers with products that are highly effective, high quality, low odor etc.

“The technician has been knowledgeable, been able to convey his observations in a concise manner and put forth a plan to treat our problem. This has been an upsetting infestation and Brian has been terrific in allaying my fears and treating the problem.”

“Your service techs are great. So nice and very knowledgeable. Also, your products work.”

Delighters	
2015	2017
Product/Materials	Friendliness
Friendliness	Helpfulness
Politeness	Product/Materials
Helpfulness	The Employees/Staff
Ability to Explain	Experienced/Knowledgeable

New Delighters in 2017

“Techs are knowledgeable and can communicate what’s going on in a way I understand it. They are personable and care about doing a good job.”

WHAT ARE THE PAIN POINTS IN THE CUSTOMER EXPERIENCE?

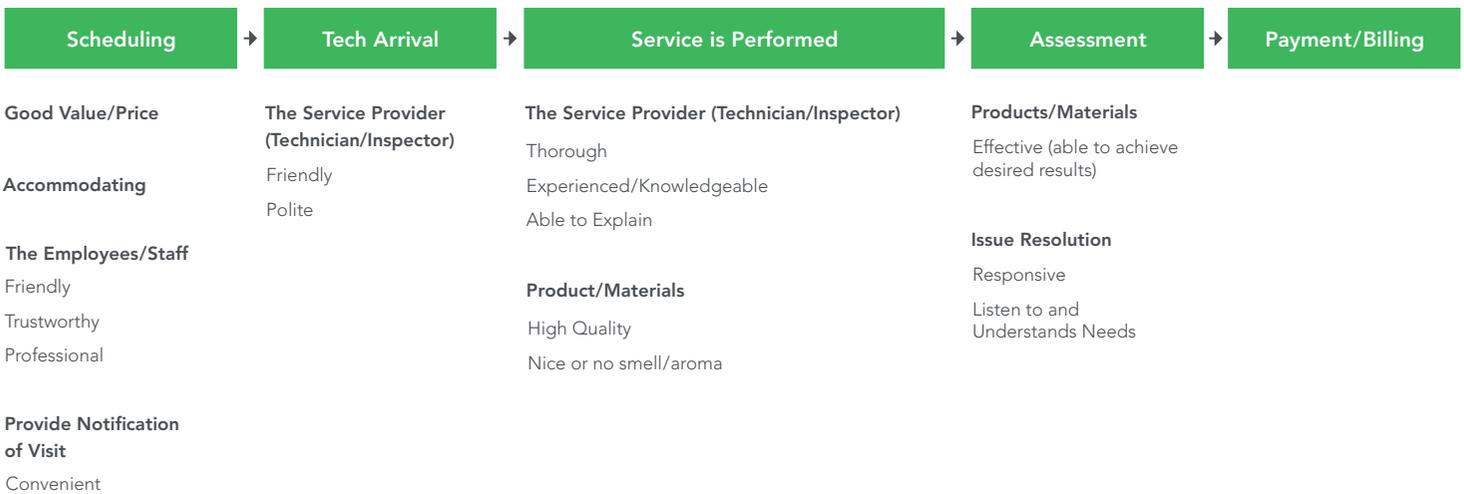
The most negative aspects of the experience are difficulties with scheduling, the technician’s arrival, and the ineffectiveness of the service to control the pests.

Scheduling	Tech Arrival	Service is Performed	Assessment	Payment/Billing
Booking or Scheduling Process Difficult to use Poor communication Don’t listen to/understand needs Not consistent Not convenient Not accurate Inefficient with time Not able to accommodate Low level of customer service	The Service Provider (Technician/Inspector) Not reliable/dependable, i.e. not on time Poor communication Not polite Not honest Not trustworthy Not able to accommodate Low level of customer service	The Service Provider (Technician/Inspector) Not thorough Not consistent Inefficient with time	The Service Provided Not effective (did not achieve desired results) Not thorough Did not deliver on promises Not good value/price Issue Resolution Not responsive	
No notification of visit Not reliable/dependable				

“[The technician] called ...could he come by early? I told him “no”...He wanted to know if I wanted to reschedule for another time? I ended up rescheduling to the next morning at 9. ...He was supposed to call when he was on his way over. He never called, just a knock on my front door at 8:30.”

WHAT MAKES A GREAT CUSTOMER EXPERIENCE?

A great experience has a smooth scheduling process, a friendly, knowledgeable, and thorough technician combined with effective products that get results.



"Every service person ever to come into my home has been courteous, friendly, helpful, as are the people who answer the phone in the office. I trust [Company] to do a thorough inspection, to treat all areas of my home, as well as the area around my home, and I have recommended them to many friends. I am very happy to have signed on with [Company] years ago, and wish all of you a very Merry Christmas!"

"[Company] works with customers to make appointments fit in to their schedules. Cody is thorough, personable and answers all questions knowledgeably. We are very happy with their service."

Listen360 is a powerful, NPS-based customer engagement platform for companies that understand customer feedback is key to creating loyalty, making smart decisions and growing their business. The Listen360 platform enables businesses to engage customers, take necessary action to improve deficiencies, and transform delighted customers into brand advocates via social networks Twitter, Google, Yelp and more.

Easy to implement and use at every location and level within an organization, the Listen360 platform has identified more than \$8.7 billion in at-risk business for the more than 20,000 customers we serve globally. We help businesses around the world build better customer relationships. **Learn more at listen360.com.**