

# Fabrizio Ward +



Business to Business Survey of Uniform and Textile Rental Decision Makers

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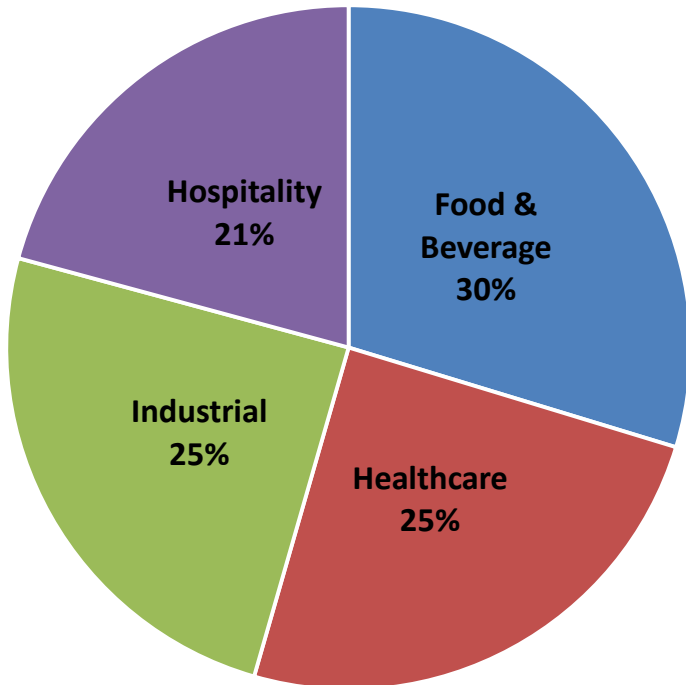
## Methodology

- Online business to business survey of uniform and textile rental decision makers in the Healthcare, Hospitality, Food & Beverage, and Industrial industries.
- Sample size of n200:
  - Food and Beverage, n59
  - Industrial, n50
  - Healthcare, n50
  - Hospitality, n41
- All participants either rent uniforms or reusable textiles, with the exception of hospitality participants, who were allowed into the survey regardless if they rented textiles or uniforms.
- Survey conducted February 24 – March 7, 2015
- Participants recruited from an online panel company

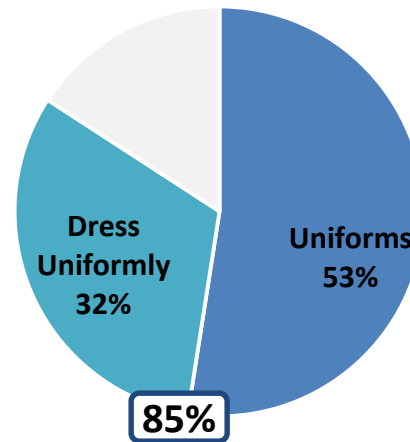
# Industry makeup, Uniform & Reusable Textile Use

## Among Business Decision Makers

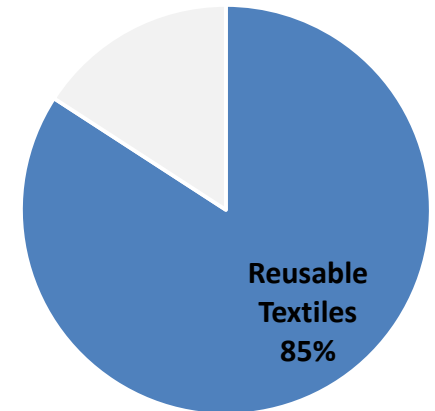
### Industry Type



### Wears Uniforms



### Uses Reusable Textiles



Use (%)	Healthcare	Hospitality	Food/Bev	Industrial
<b>Wears Uniform</b>	<b>82</b>	<b>83</b>	<b>87</b>	<b>84</b>
<i>Actual Uniforms</i>	40	46	56	66
<i>Dresses Uniformly</i>	42	37	31	18
<b>Uses Reusable Textiles</b>	<b>90</b>	<b>93</b>	<b>90</b>	<b>68</b>

Q1. Which industry does your business fall into?

Q2. Do your employees wear an actual uniform (with the name of your business or logo) and/or dress in such a way to look uniformly?

Q3. Does your business require the use of reusable textiles such as linen napkins, tablecloths, towels, sheets, hospital gowns, scrubs, lab coats, mats etc.?

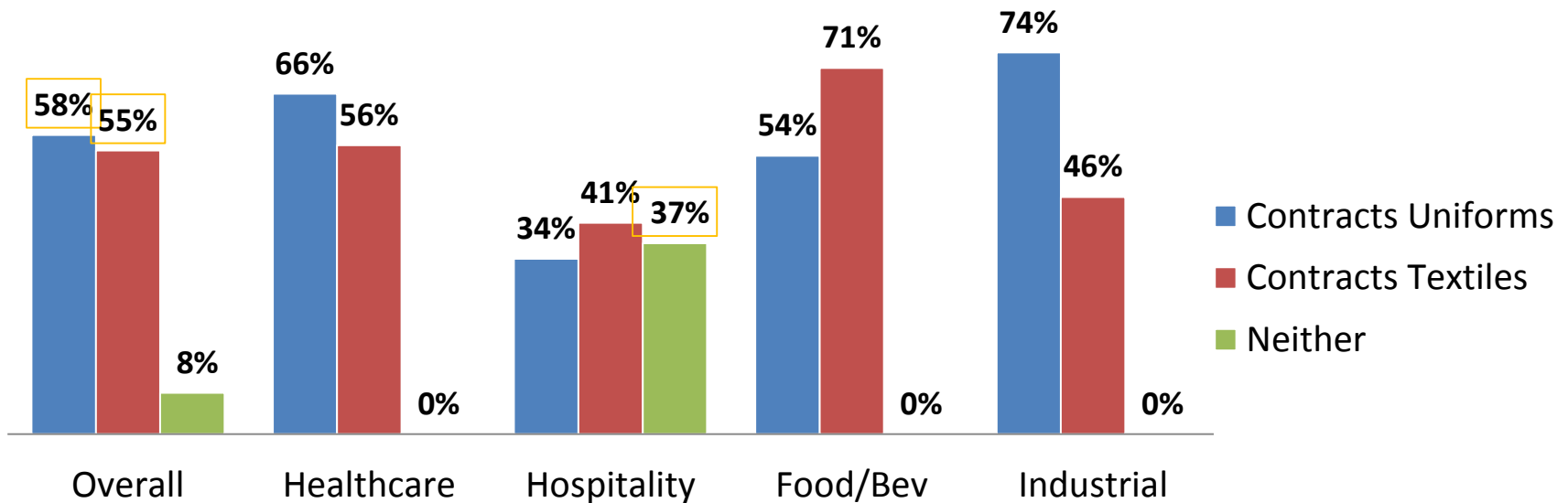
A majority contracts out uniforms and textiles.

One in five contracts out both uniforms and textiles.

A little more than a third of hospitality companies do not contract out either.

## Among Business Decision Makers Contracts Uniforms or Textiles

(All Required to Contract Uniforms or Textiles with the Exception of Hospitality)



Contract (%)	Overall	Healthcare	Hospitality	Food/Bev	Industrial
Contracts Uniforms, NOT Textiles	38	44	22	29	54
Contracts Both Uniforms & Textiles	21	22	12	25	20
Contracts Textiles, NOT Uniforms	35	34	29	46	26

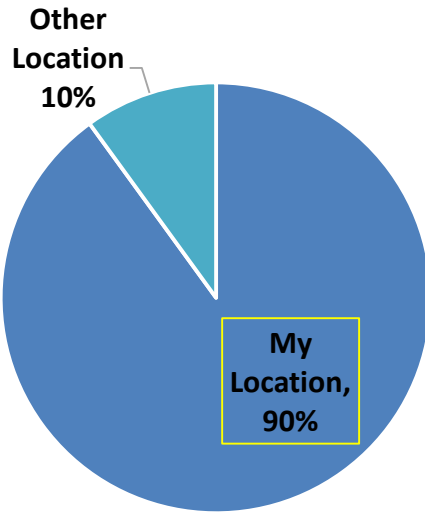
Q4. Does your business contract out with a company to wash and maintain uniforms or reusable textiles? (CHOOSE ALL THAT APPLY)

Almost all uniform and textile rental decisions are made at the decision maker's location.

Three in four are either solely responsible for the rental decision, or play a major role.

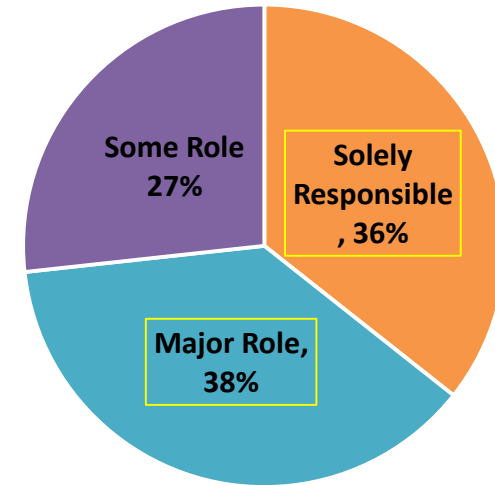
**Among Business Decision Makers**

**Renting Uniforms & Textiles  
Decision Location**



Location (%)	Healthcare	Hospitality	Food/Bev	Industrial
My Location	88	83	95	92
Other Location	12	17	5	8

**Decision Making Role  
in Rental Process**



Decision Maker (%)	Healthcare	Hospitality	Food/Bev	Industrial
Solely Responsible	28	32	42	38
Major Role	42	32	32	44
Some Role	30	37	25	18

Q5. When making decisions about renting uniforms and textiles, is the decision made at your location, or another location? , tablecloths, towels, sheets, hospital gowns, scrubs, lab coats, mats etc.?  
 Q6. How much of a role do you play now, or would play, in contracting or working with service providers that supply either employee uniforms or reusable textiles (e.g. linens, towels, sheets, mats, etc.)?

## Executive Summary

- Businesses surveyed identify as the reason their employees wear uniforms is for the image of their business first and foremost.
- Top reasons selected for contracting uniforms are uniforms being washed, maintained, and replaced by the provider followed by convenience of not managing the process, having waste washed properly, and quality.
- Similar to uniforms, textiles being washed, maintained, and replaced by the service provider is the top reason chosen for contracting textiles followed by convenience, waste being washed, and cost savings.
- Factors other than price that matter most when picking a service provider are customer service, reliability, and quality controls.
- Overall, businesses surveyed are not entirely price sensitive when it comes to selecting a service provider; price being among the most important factors to a majority versus the only or primary factor.
- That said, a service provider that is able to beat the price of the current provider is the most likely reason businesses offer for why they would switch to a new provider. This is especially true among the Food/Bev segment.

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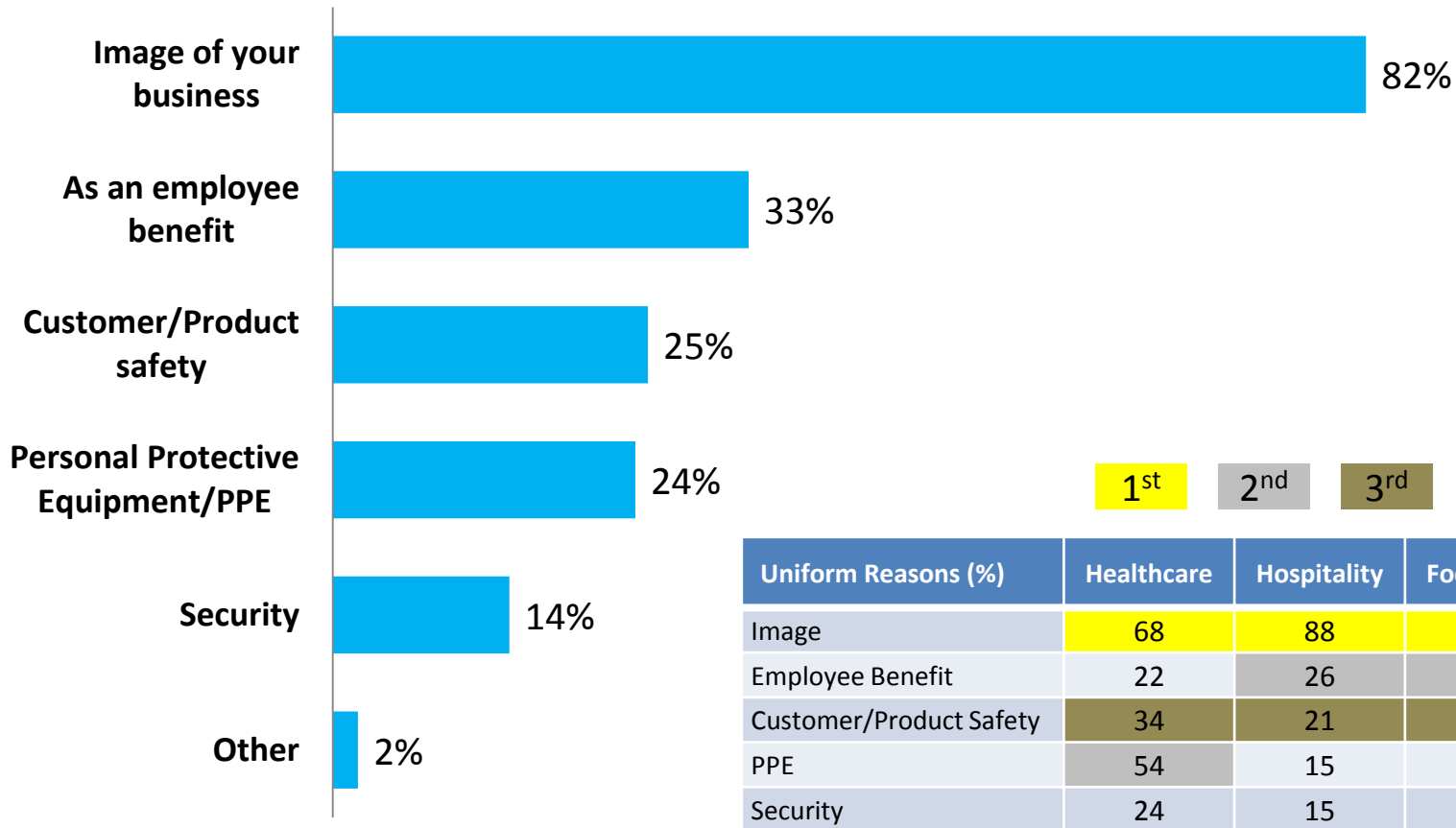
## Universal Questions



Company image is clearly the top reason for having employees wear uniforms.

## Reasons Businesses Wear Uniforms

**Among Business Decision Makers That Rent Uniforms or Textiles**  
 (Multiple Responses Allowed, Answers Add Up To More Than 100%)



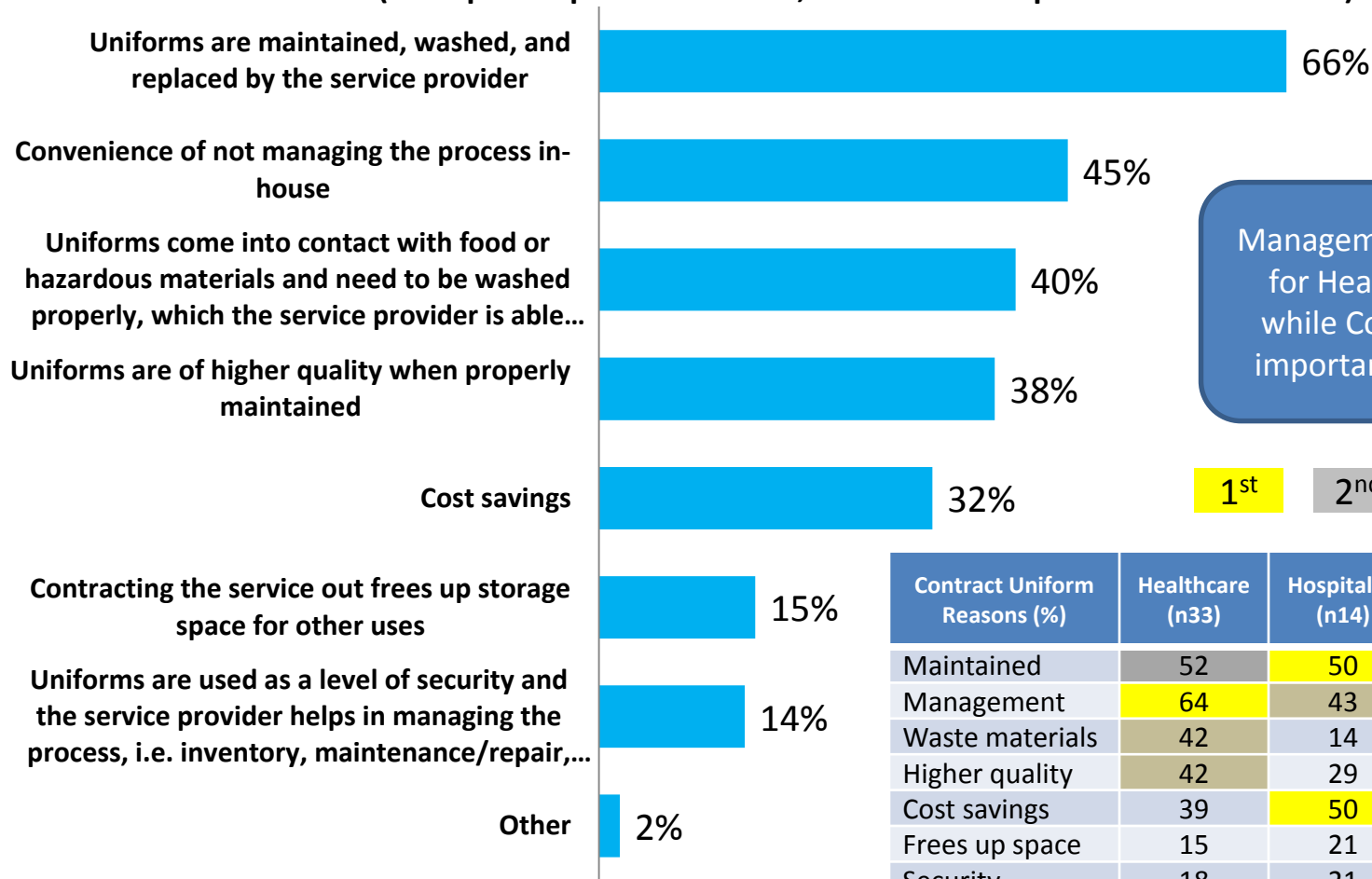
Q7. Which, if any, of the following comes closest to the reasons your employees wear uniforms?

Garment maintenance is the most frequent reason given for contracting uniforms followed by convenience, waste contact, and quality.

## Contracting Uniforms Reasons

Among Business Decision Makers That Rent Uniforms, n116

(Multiple Responses Allowed, Answers Add Up To More Than 100%)



Management is the top reason for Healthcare companies, while Cost Savings jumps in importance with Hospitality.

1<sup>st</sup> 2<sup>nd</sup> 3<sup>rd</sup>

Contract Uniform Reasons (%)	Healthcare (n33)	Hospitality (n14)	Food/Bev (n32)	Industrial (n37)
Maintained	52	50	66	84
Management	64	43	44	30
Waste materials	42	14	53	35
Higher quality	42	29	41	35
Cost savings	39	50	25	24
Frees up space	15	21	16	11
Security	18	21	9	11

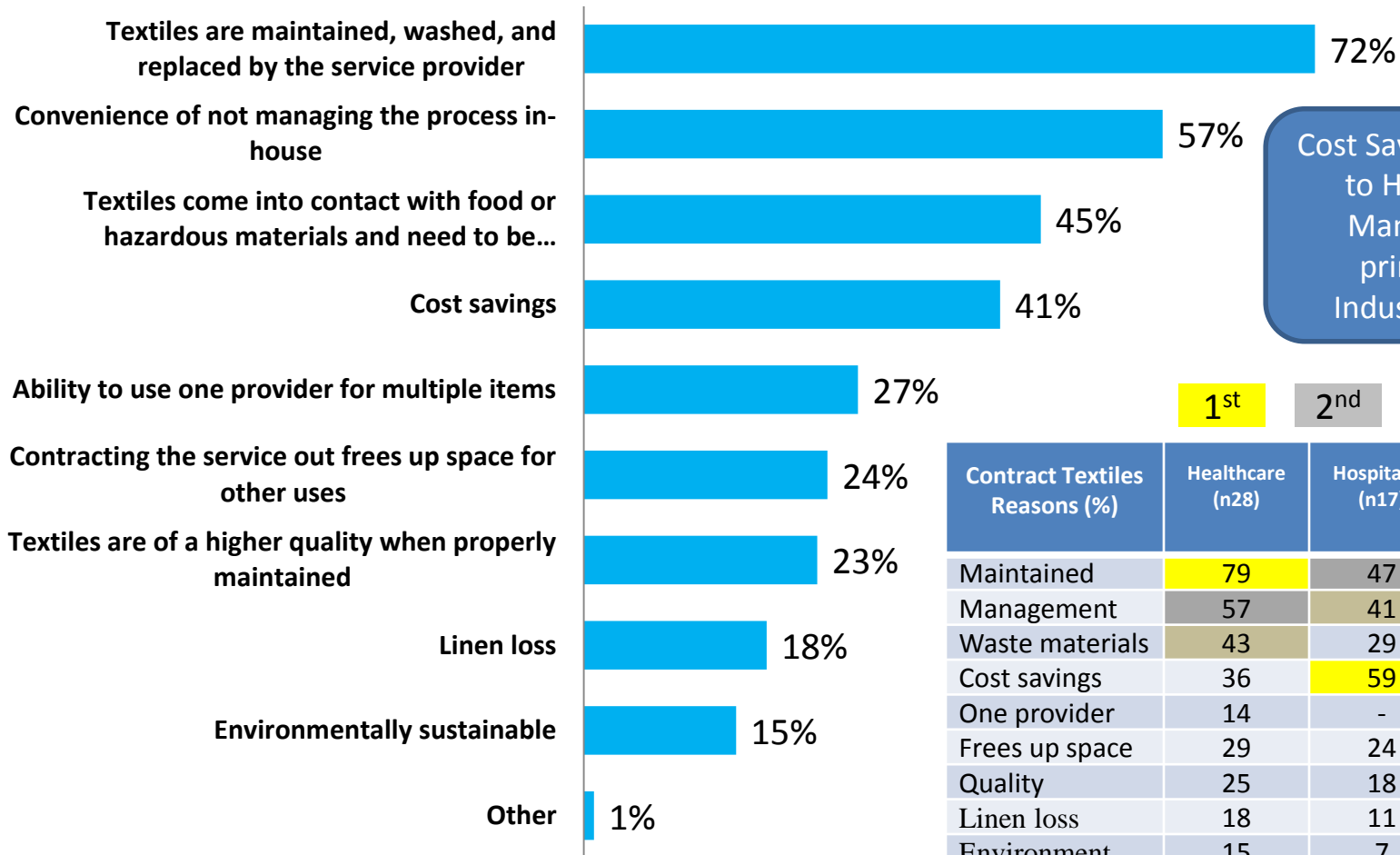
Q14. Please indicate which of the following reasons influence your decision to contract for uniforms. (CHOOSE ALL THAT APPLY)

Product maintenance is the number one reason for contracting textiles followed by convenience, waste contact, and cost savings.

## Contracting Textiles Reasons

**Among Business Decision Makers That Rent Textiles, n110**

(Multiple Answers Allowed, Responses Add Up To More Than 100%)



Cost Savings are important to Hospitality, while Management is the primary factor for Industrial companies.

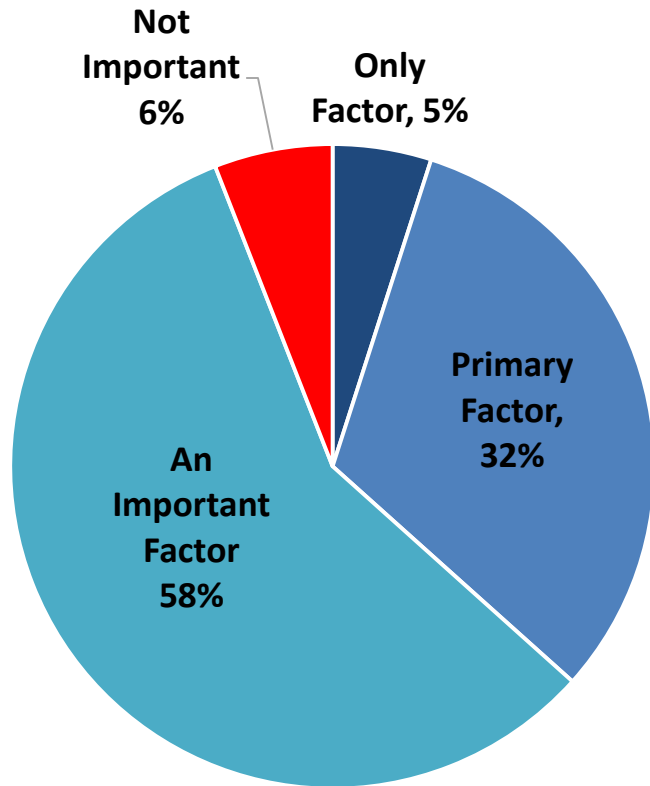
Contract Textiles Reasons (%)	Ranking			
	1 <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>	
	Healthcare (n28)	Hospitality (n17)	Food/ Bev (n42)	Industrial (n23)
Maintained	79	47	88	52
Management	57	41	57	70
Waste materials	43	29	52	48
Cost savings	36	59	40	35
One provider	14	-	38	43
Frees up space	29	24	19	26
Quality	25	18	24	22
Linen loss	18	11	24	21
Environment	15	7	24	14

Q15. Please indicate which of the following reasons influence your decision to contract for reusable textiles. (CHOOSE ALL THAT APPLY)

Price is an important factor when deciding on uniform and textile service providers.

**Among Business Decision Makers That Rent Uniforms or Textiles**

**Importance of Price When Renting Textiles or Uniforms**



Price Importance (%)	Healthcare	Hospitality	Food/Bev	Industrial
Only Factor	6	5	3	4
Primary Factor	26	27	41	32
An Important Factor	62	61	53	56
Not Important	6	7	3	8

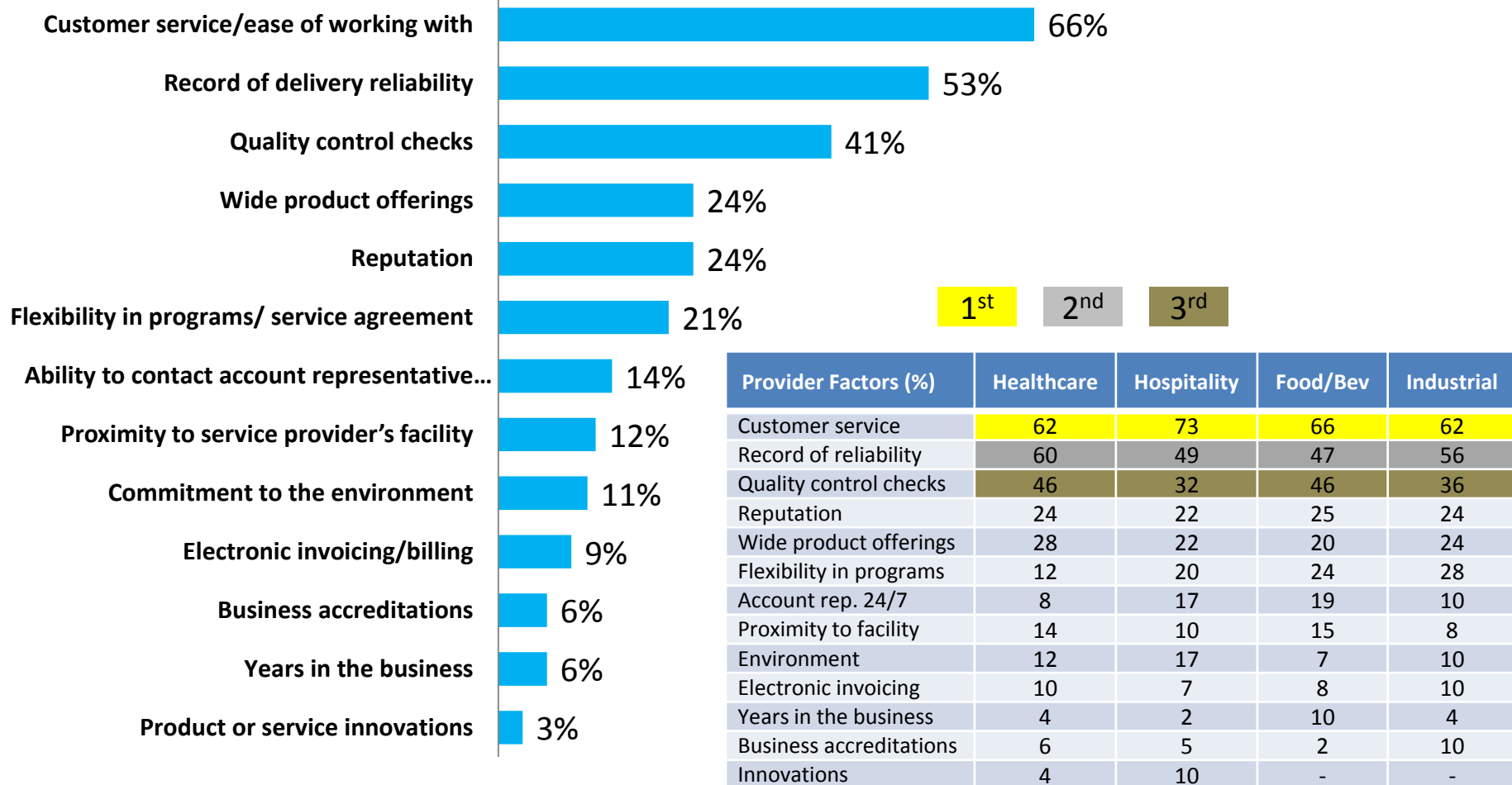
Q10. When it comes to renting your employee uniforms, linens, or other materials for your business, how important is price in selecting a service provider?

When price is removed from the equation, Customer Service, Reliability, and Quality Controls are the three most widely considered factors to select a service provider.

## Most Important Factors Selecting a Provider

Among Business Decision Makers That Rent Uniforms or Textiles

(Multiple Responses Allowed, Answers Add Up To More Than 100%)

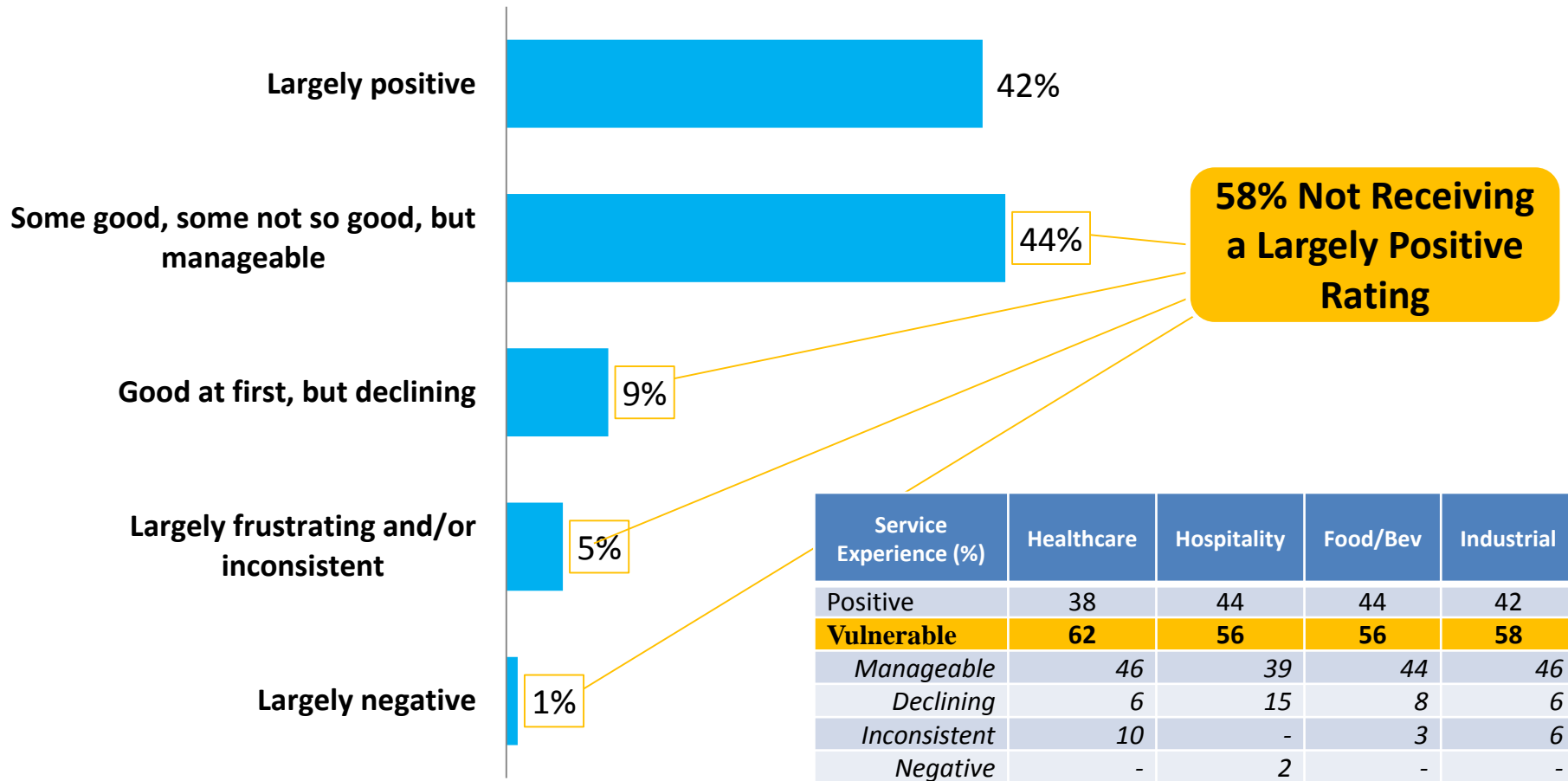


Q11. Which three of the following factors would you say are the MOST important in your decision-making process related to selecting a service provider? (CHOOSE UP TO THREE)

Majority of service providers are NOT receiving a Largely Positive Rating, and are at least somewhat vulnerable to poaching.

## Service Provider Experience

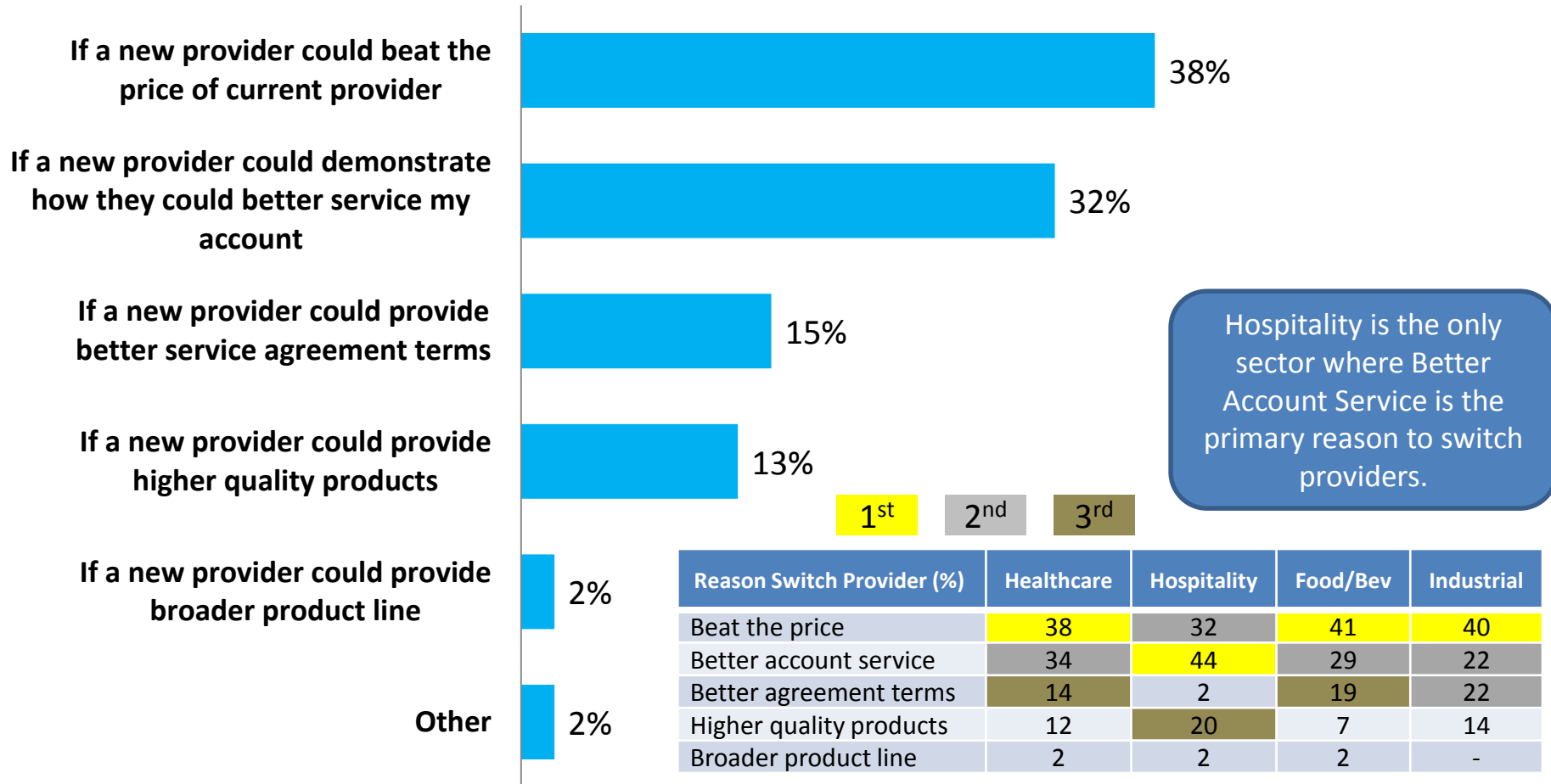
Among Business Decision Makers That Rent Uniforms or Textiles



Q13. Generally speaking, what has your experience been in working with the service providers you have and/or are currently working with? That is, generally has the experience been . . .

Price is the most frequent reason given to switch service providers, followed by better account service.

### Most Likely Reason For Switching Providers Among Business Decision Makers That Rent Uniforms or Textiles

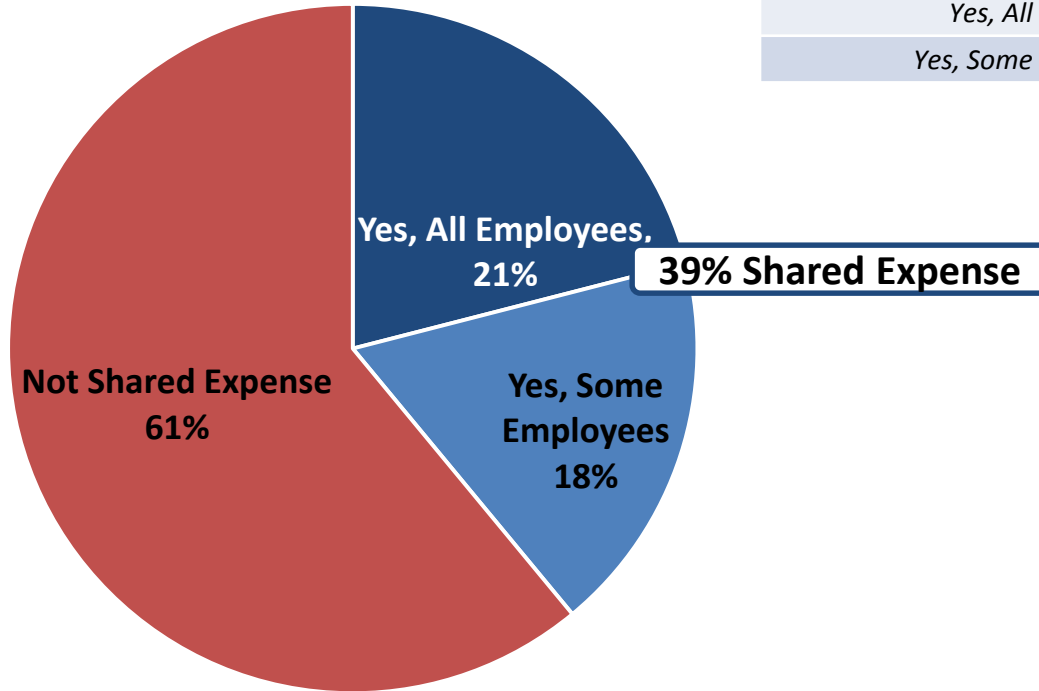


Q12. Which ONE would be, or could be, the most likely reason for switching to a new provider?

Opportunity for growth, on average two in five employees share the expense of their uniforms.

## Among Business Decision Makers That Rent Uniforms

### Shared Uniform Expense



Shared Expense (%)	Healthcare	Hospitality	Food/Bev	Industrial
<b>At Least Some</b>	<b>44</b>	<b>50</b>	<b>34</b>	<b>33</b>
<i>Yes, All</i>	<i>17</i>	<i>32</i>	<i>18</i>	<i>19</i>
<i>Yes, Some</i>	<i>27</i>	<i>18</i>	<i>16</i>	<i>14</i>

Q8. Is the expense for your employees' uniforms a shared expense between the company and individual employees?



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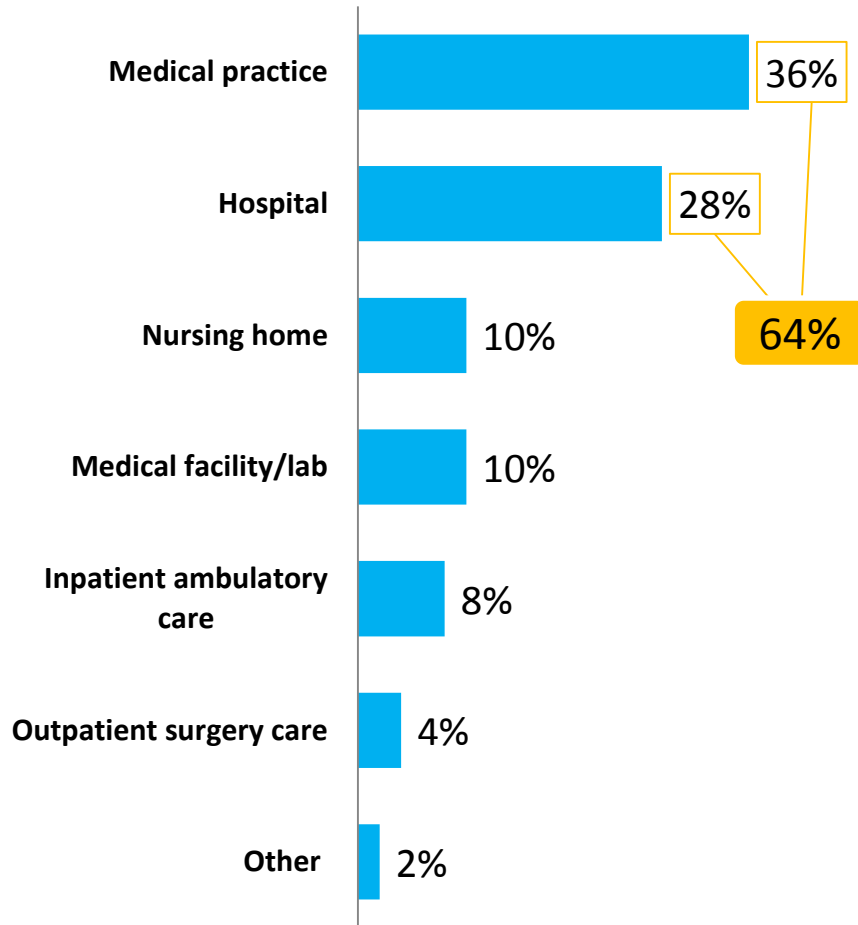


## Healthcare Specific Questions

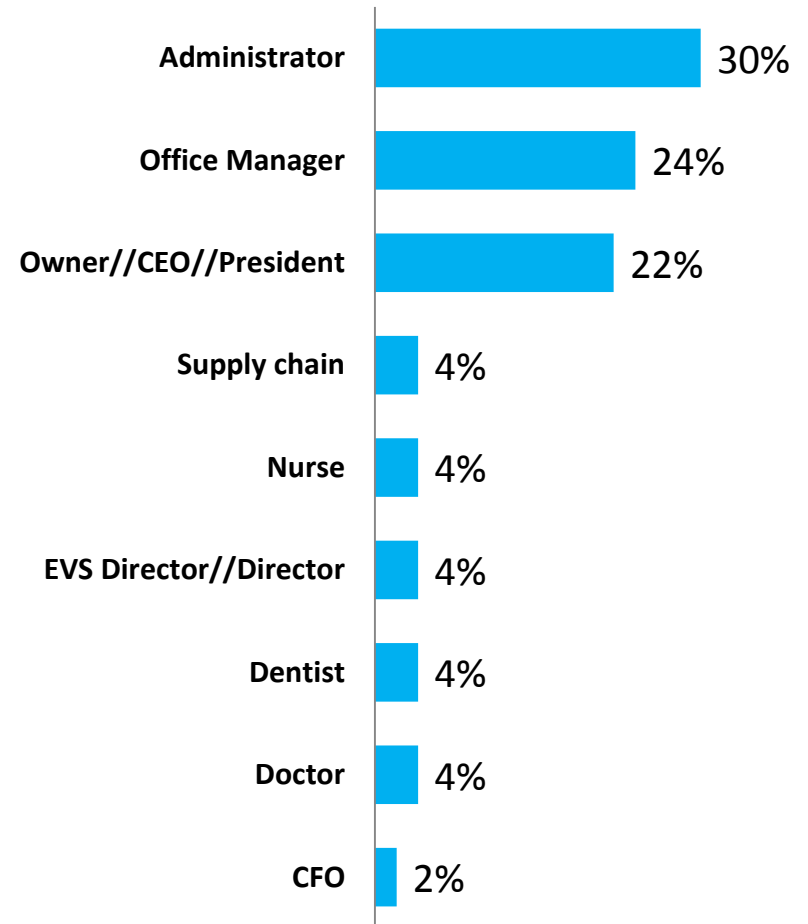
Medical practices and hospitals are two-thirds of the Healthcare sector interviews.

**Among Healthcare Business Decision Makers That Rent Uniforms or Textiles**

**Work Place**



**Position**



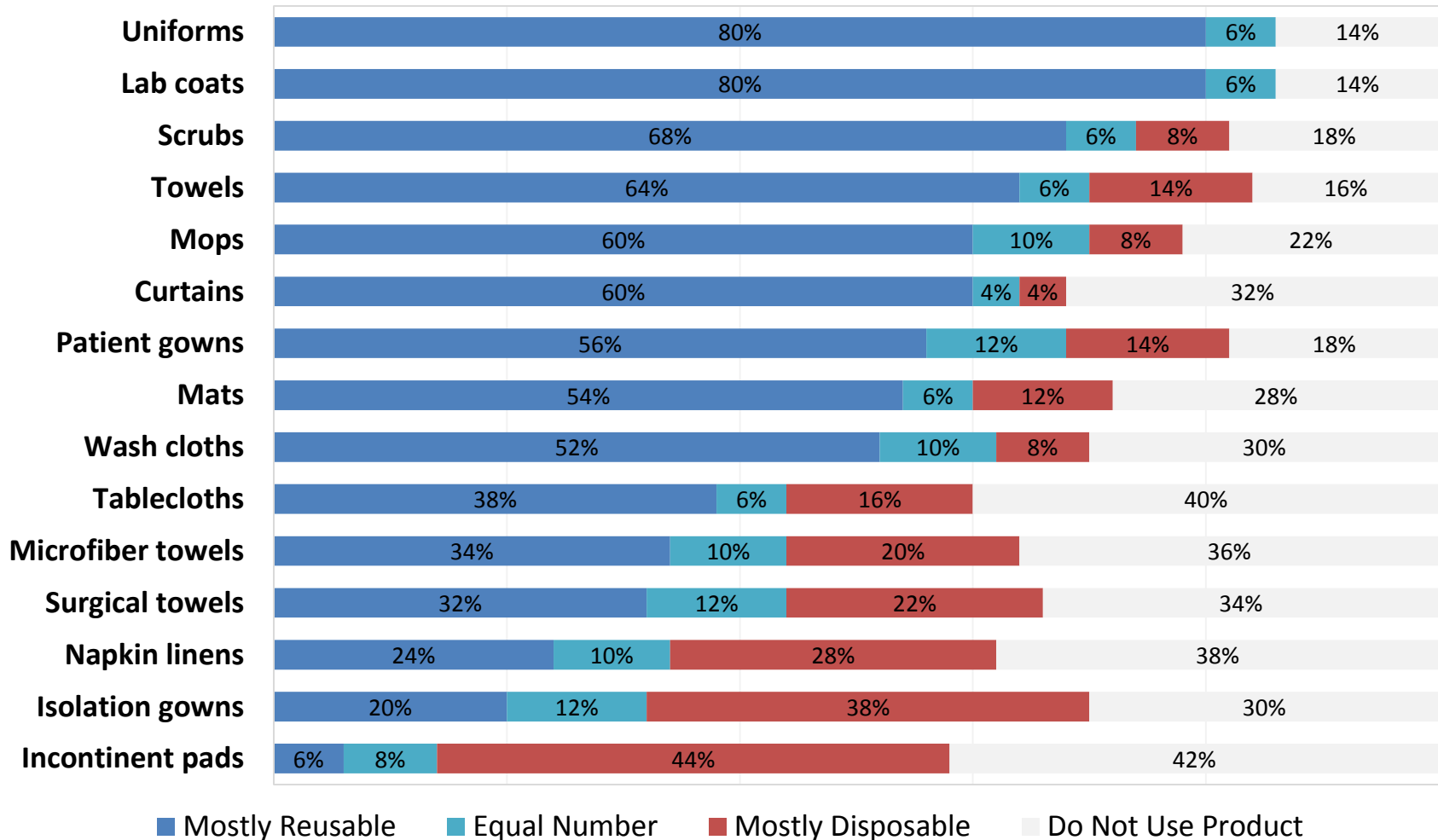
H2. Which, if any, of the following comes closest to describing your business?

H1. Which, if any, of the following describes your position at your place of work?

# Opportunity to grow business with Healthcare Companies.

## Healthcare Company Product Use & Type

Among Healthcare Business Decision Makers That Rent Uniforms or Textiles

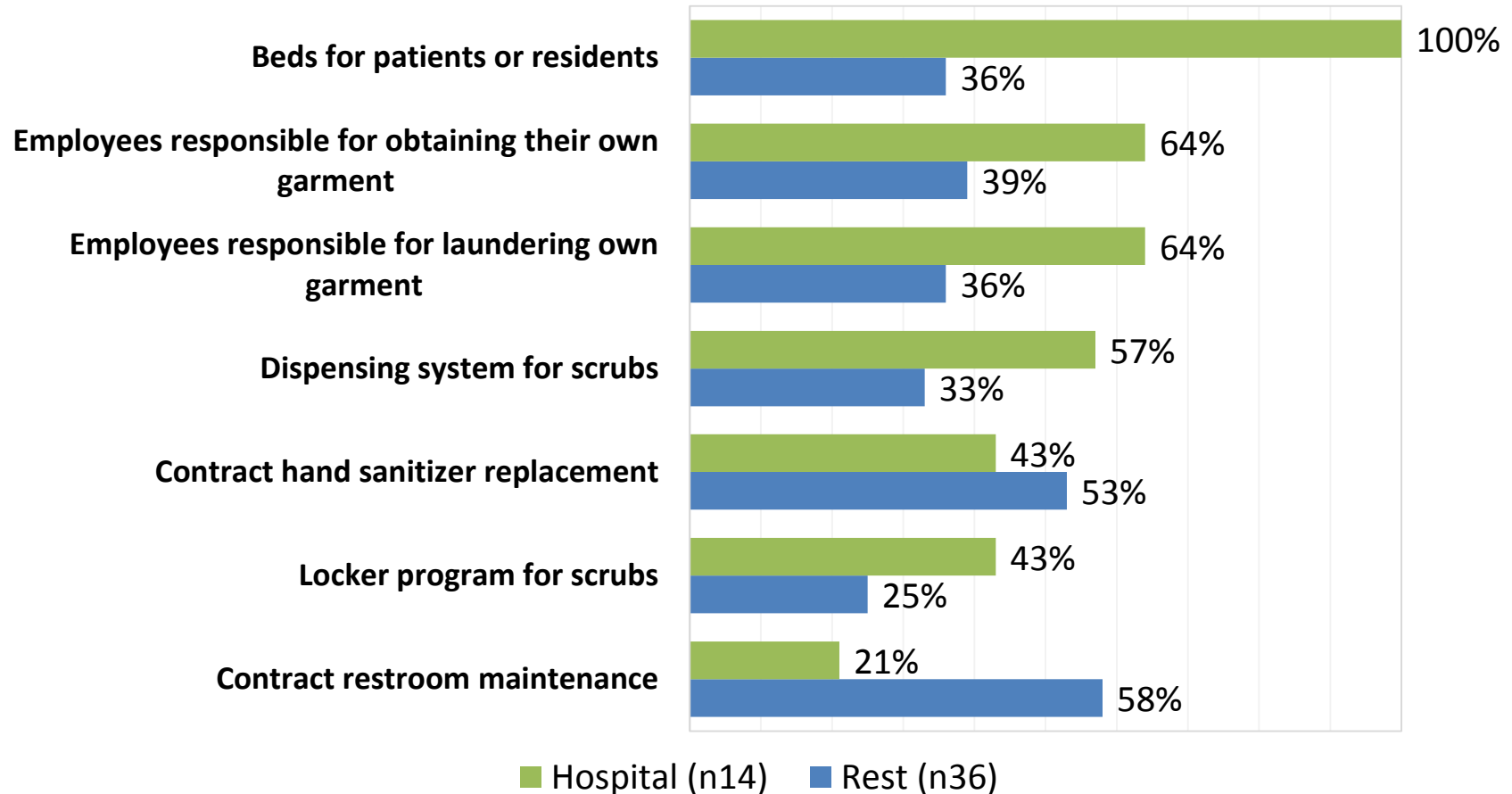


H3-17. The following contains a number of products that your healthcare facility may use. Please indicate whether you use reusable products (such as a cloth gown that can be washed) or disposable products (such as a paper gown that can be thrown away). If you do not use the product please just indicate so.

Two thirds of these hospitals require at least some employees to obtain their own medical garment and to launder it.

## Healthcare Facility and Company Programs & Policies

Among Healthcare Business Decision Makers That Rent Uniforms or Textiles



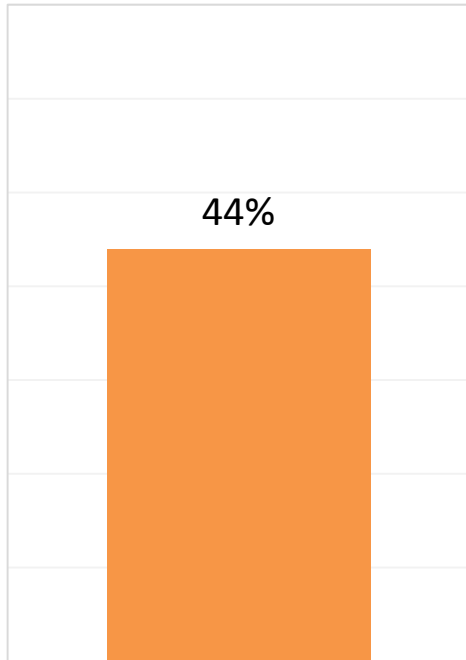
H20-24. Does your facility/company...

H18-19. Are any of the employees responsible for...

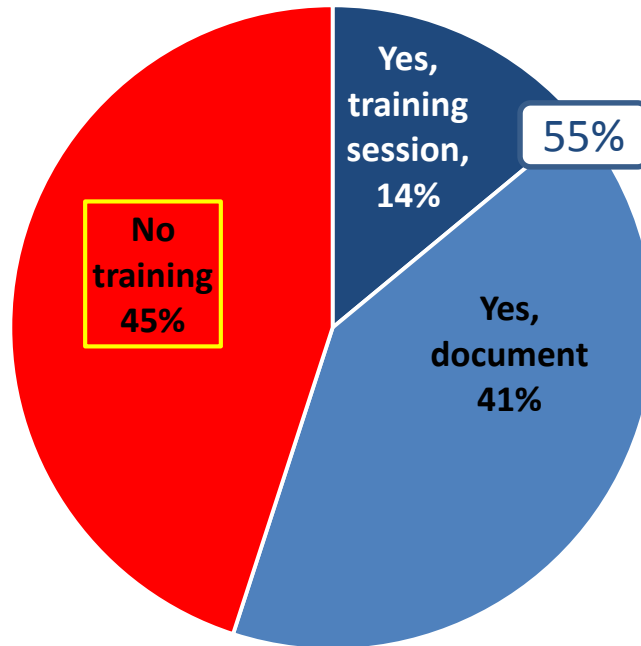
While almost half are responsible for obtaining their own garment, a little less than half of those that n have been trained on the proper procedures to wash medical garments  
 Most lab coats are cleaned four times per week or less.

**Among Healthcare Business Decision Makers That Rent Uniforms or Textiles**

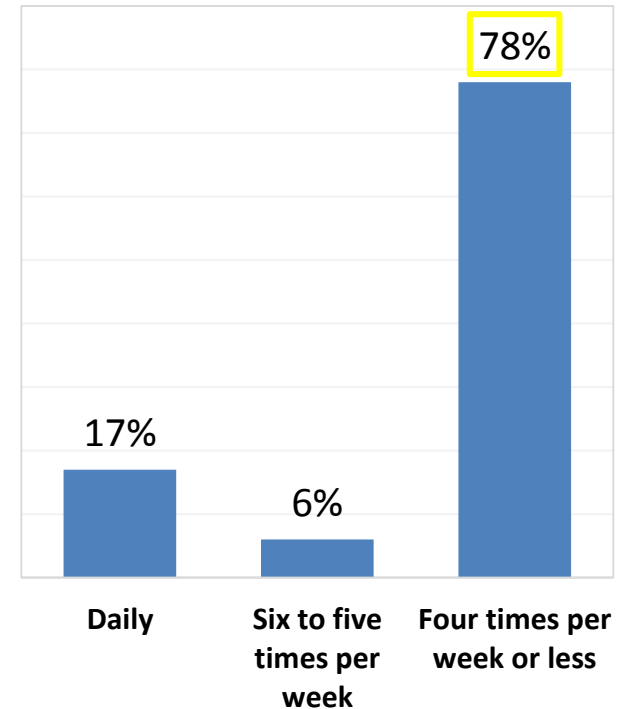
**Responsible For Washing Own Uniform**



**Trained to Clean Uniform  
 (n22 Responsible For Washing)**



**Lab Coat Cleaning Frequency  
 (n18 Responsible For Washing)**



H19. Are any of the employees responsible for cleaning any company-mandated outfits such as a uniform, lab coat, scrubs, etc.?

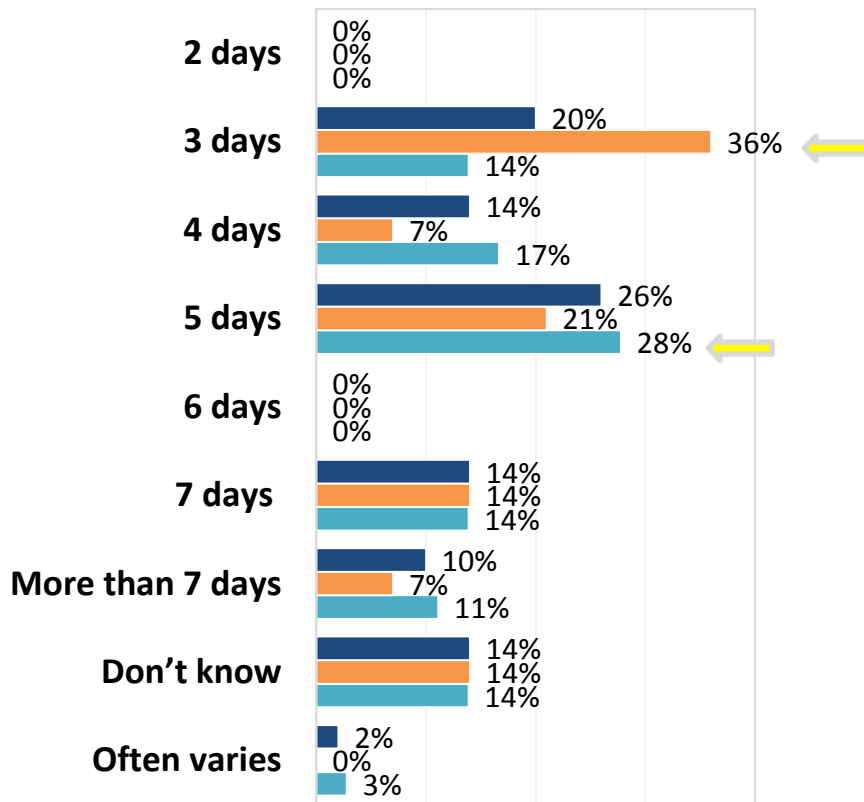
H25. Are employees required to clean their own garments given any training on the proper procedures to wash their garments?

H26. To the best of you knowledge, how often are your company's lab coats cleaned?

A plurality keeps their inventory at five par.  
 A little less than half have a problem with linen loss.

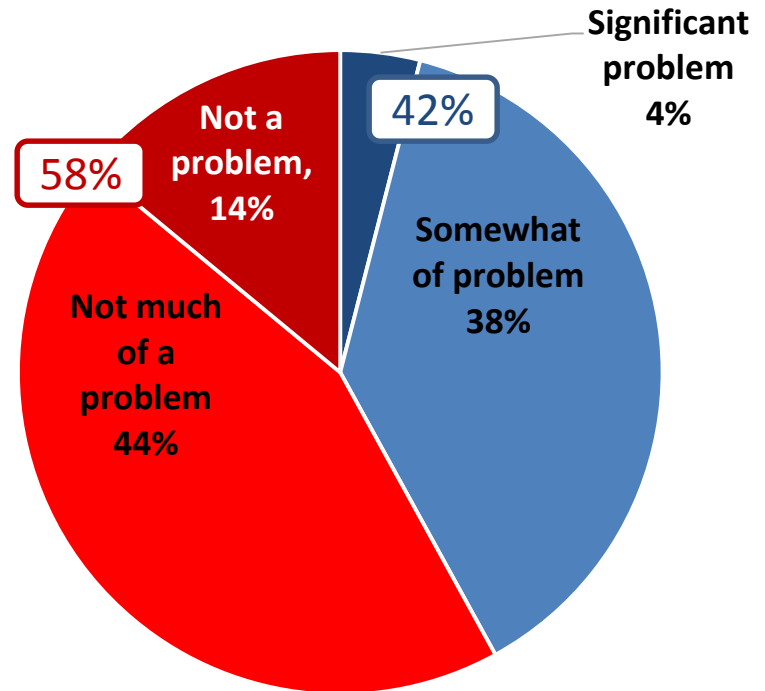
### Among Healthcare Business Decision Makers That Rent Uniforms or Textiles

**Par Levels**



■ All (n50) ■ Hospitals (n14) ■ Rest (n36)

**Linen Loss**



Linen Loss (%)	Hospital (n14)	Rest (n36)
Problem	64	33
Not A Problem	36	67

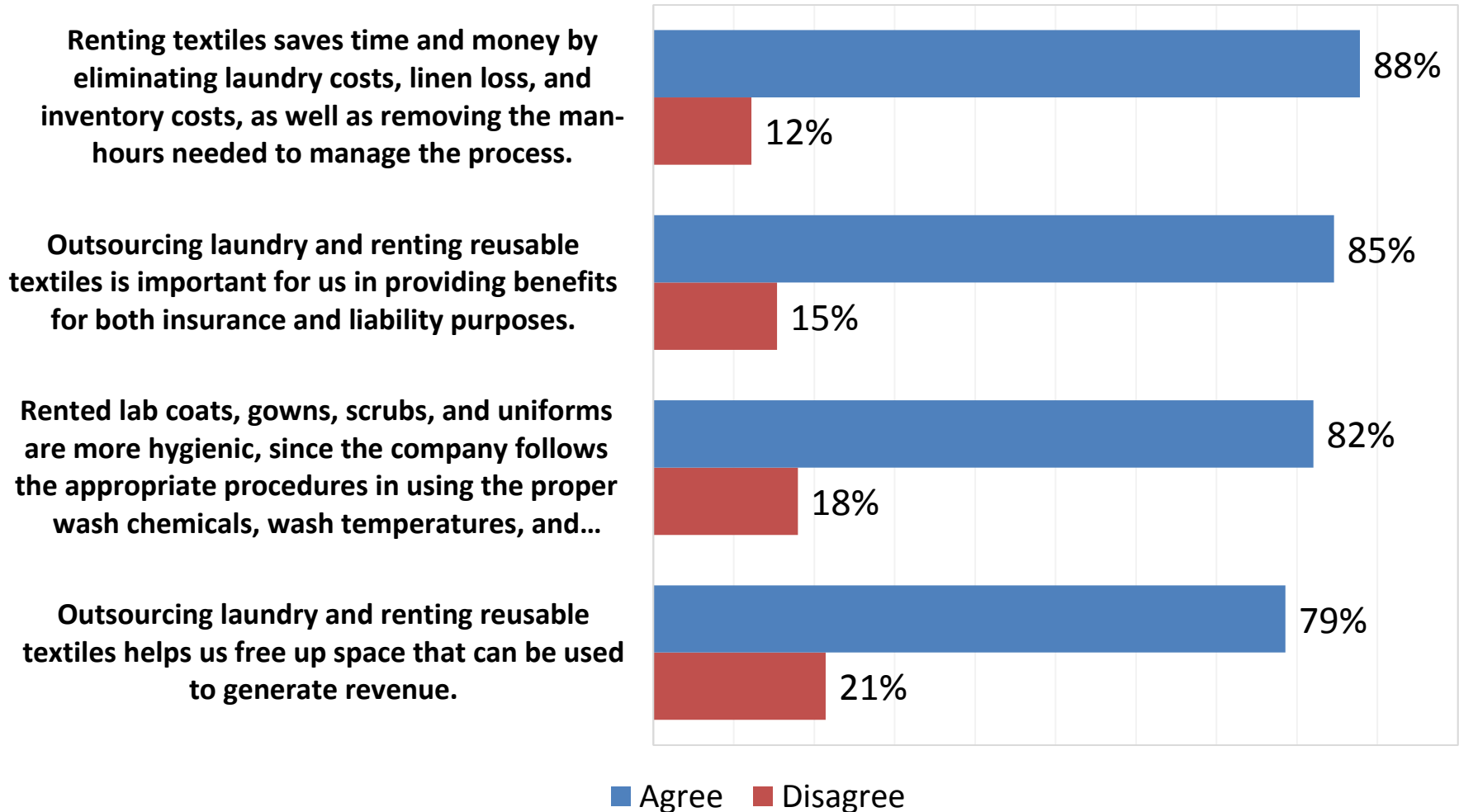
H27. What inventory/PAR level do you carry?

H28. Linen loss is the loss of items such as towels, sheets, and garments due to damage to the item, theft, or items destroyed that could be washed. How prevalent of a problem is linen loss for your business?

Most see the benefits of renting textiles and medical garments, and outsourcing laundry.

## Statement Agreement Among Those With An Opinion

### Healthcare Business Decision Makers That Rent Uniforms or Textiles



H29-32. Next you'll see a series of statements about contracting reusable textiles. For each of these, please indicate whether – based on your experience – you would agree or disagree with the statement.

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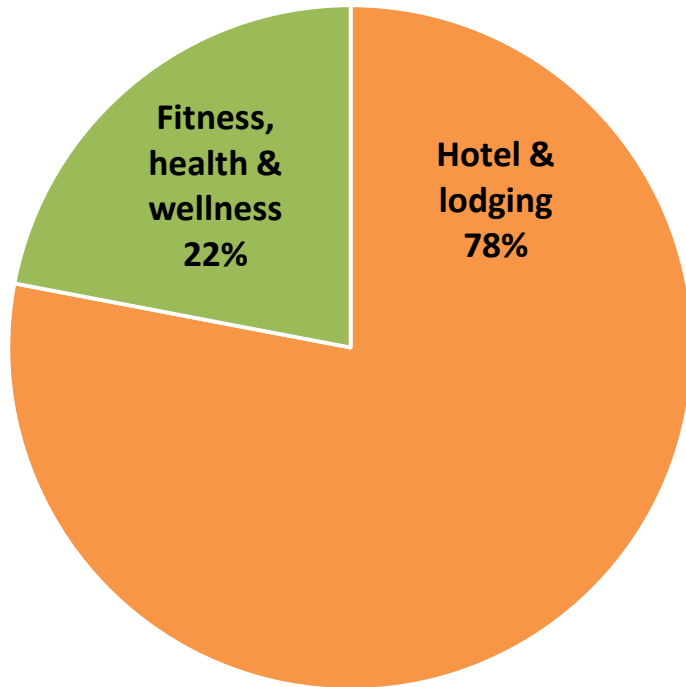
## Hospitality Specific Questions



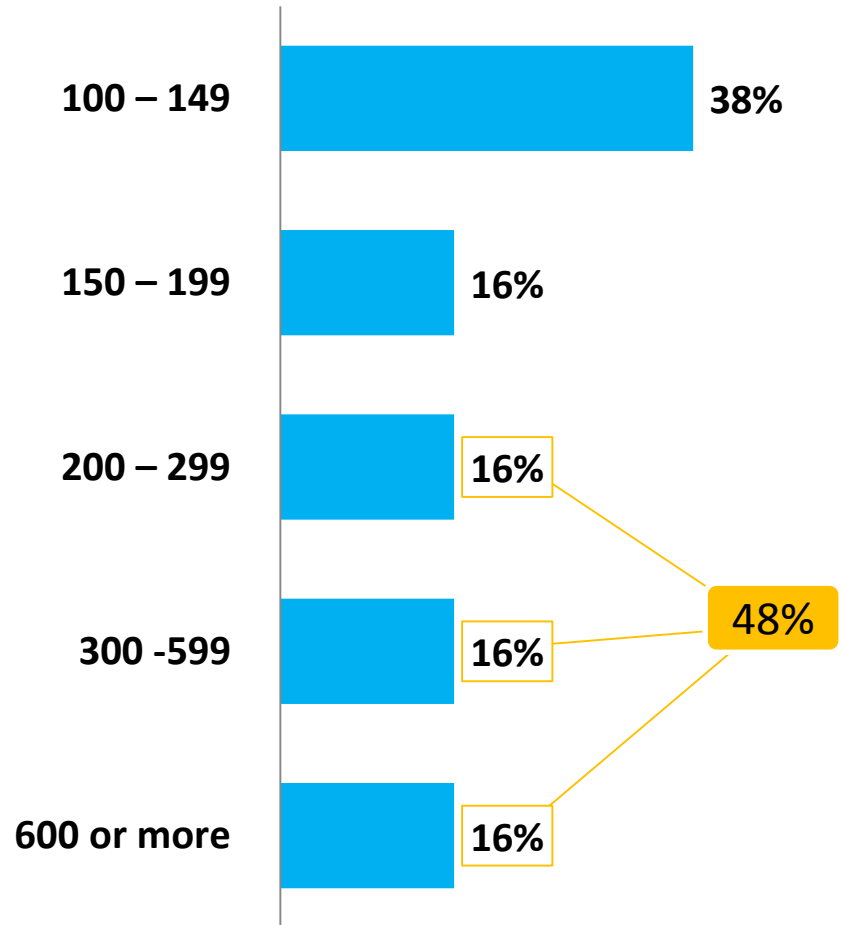
Most of the Hospitality interviews are with hotels.  
Half of the hotels have over 200 beds.

### Among Hospitality Business Decision Makers

#### Hospitality Industry Type



#### Hotel Rooms (n32 Hotel Rooms)

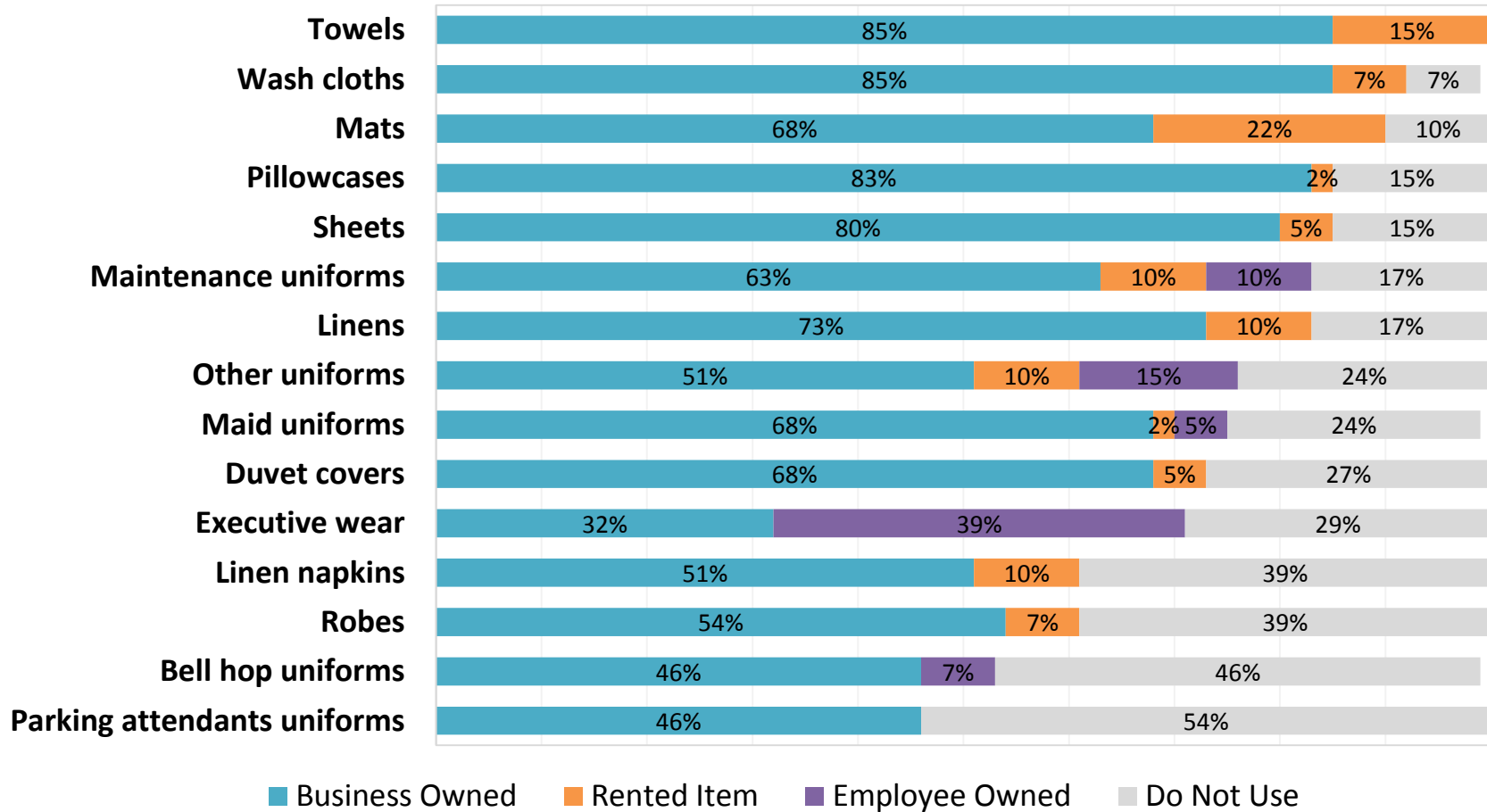


Q1. Which industry does your business fall into?  
T1. How many hotel rooms does your property have?  
TRSA Online Survey - March 2015

# Hospitality Product & Uniform Ownership

## Product & Uniform Ownership

Among Hospitality Business Decision Makers



T2-10. The following contains a number of products that your property may use. Please indicate whether the business owns the product or whether the product is rented. If your property does not use the product please just indicate so.

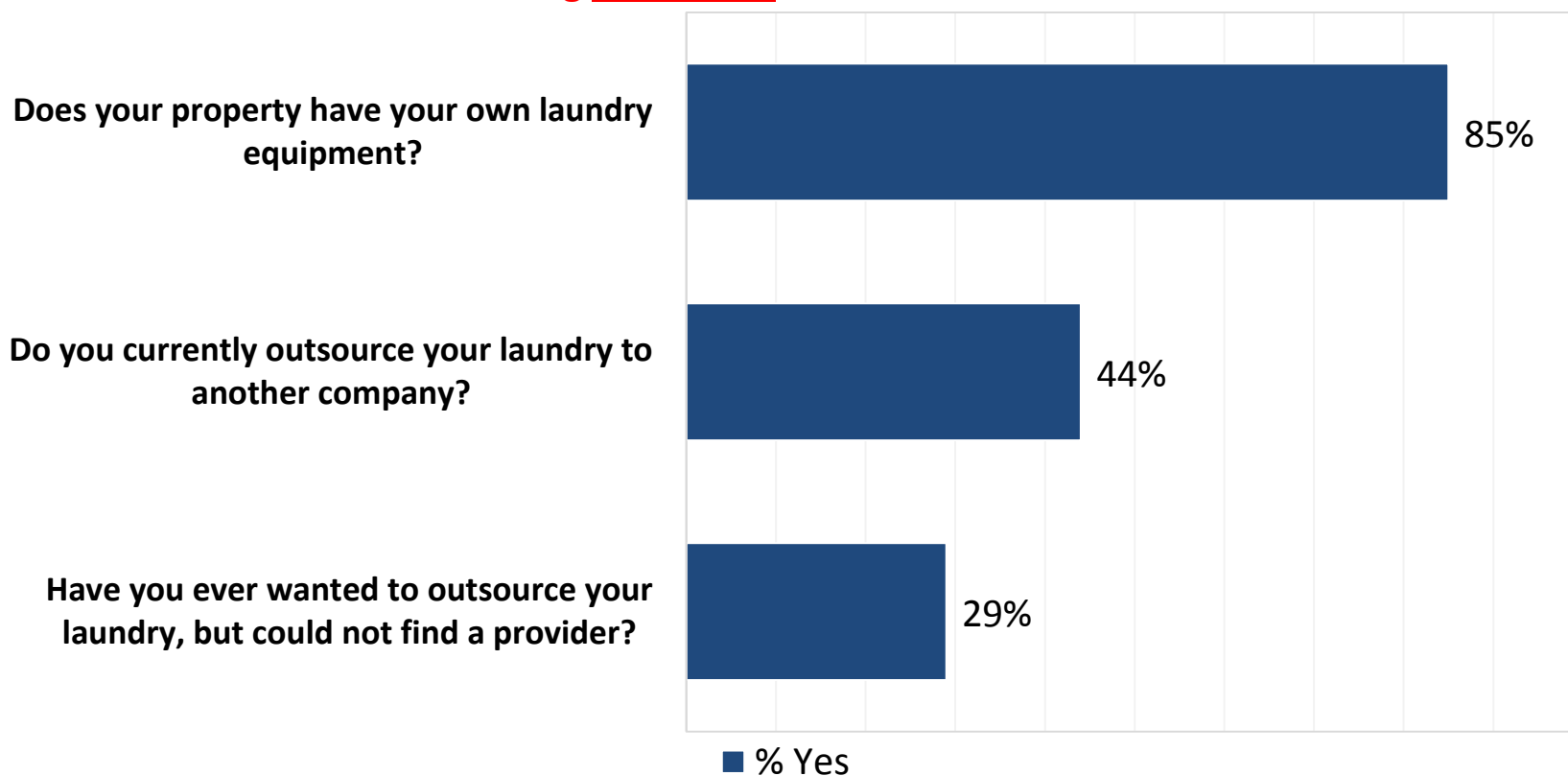
T11-16. The following contains a number of garments that employees may use. Please indicate whether the business owns the garment, the employee owns the garment, or whether the product is rented. If your company does not use the garment please just indicate so.

Most own their own laundry equipment. Fewer than half in the Hospitality segment currently outsource.

Nearly a third have tried to outsource their laundry, but could not find a provider.

## Laundry Equipment & Outsourcing Experiences

Among Hospitality Business Decision Makers



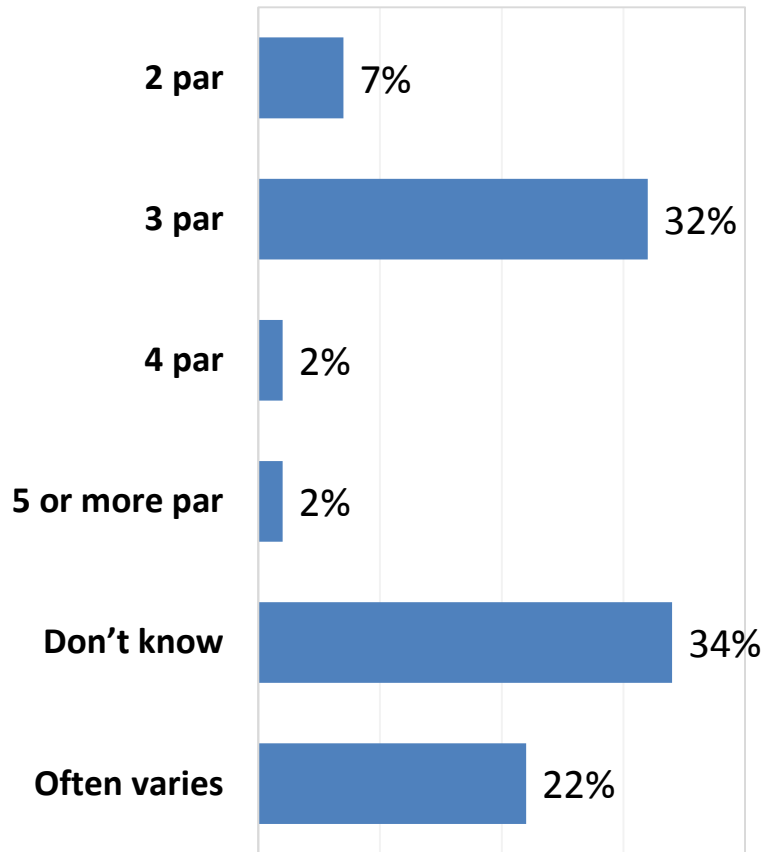
T17-20. Please indicate the response that most accurately reflects your situation.

While a plurality is uncertain, three par is the most frequently selected inventory level.

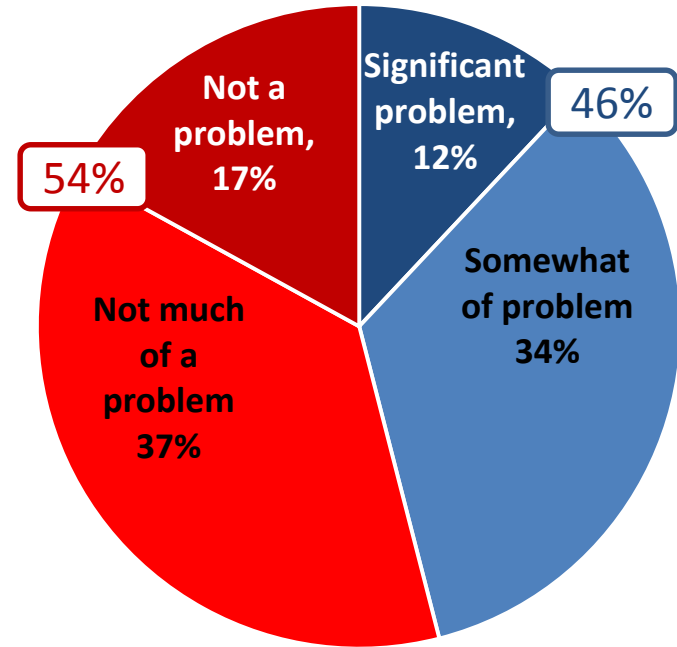
Half believe linen loss is a problem.

**Among Hospitality Business Decision Makers**

**Par Levels**



**Linen Loss**



Linen Loss (%)	Health, Wellness (n9)	Hotels (n32)
Problem	22	53
Not A Problem	78	47

T24. What inventory/PAR level do you carry?

T21. "Linen loss" refers to the loss of towels, sheets, bedding, wash clothes and robes due to damage, misuse or theft. How prevalent of a problem is linen loss for your business?

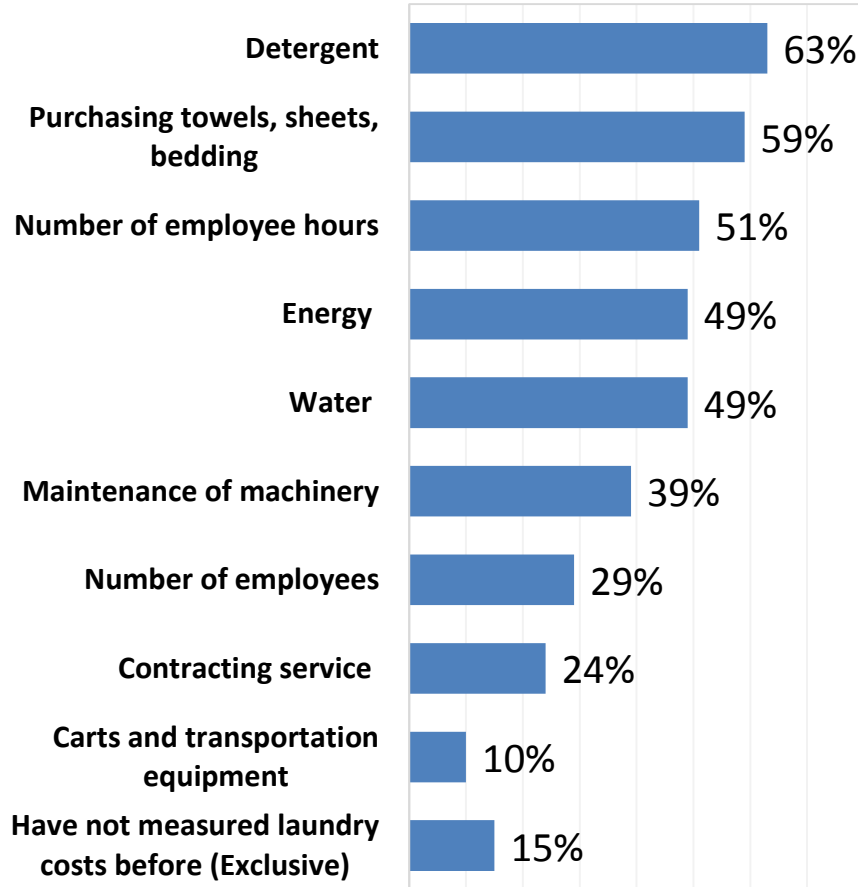
Detergent, textile purchases, employee hours, and energy & water costs are the most frequent factors in estimating laundry costs.

Two in five of these companies have monthly laundry costs over \$5,000.

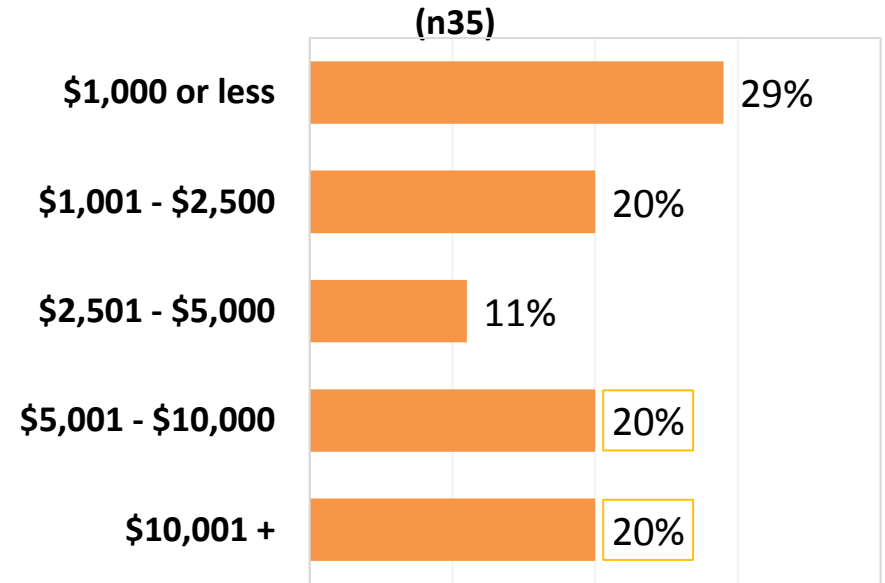
**Among Hospitality Business Decision Makers**

**Factors in Estimating Laundry Costs**

(Multiple Responses Allowed, Adds Up To More Than 100%)



**Estimated Monthly Laundry Cost**



Average Monthly Cost

Average Monthly Cost	Hospitality	Hotels 100-199 Rooms (n15)	Hotels 200+ Rooms (n13)
<b>Mean</b>	\$7,227	\$4,264	\$11,269

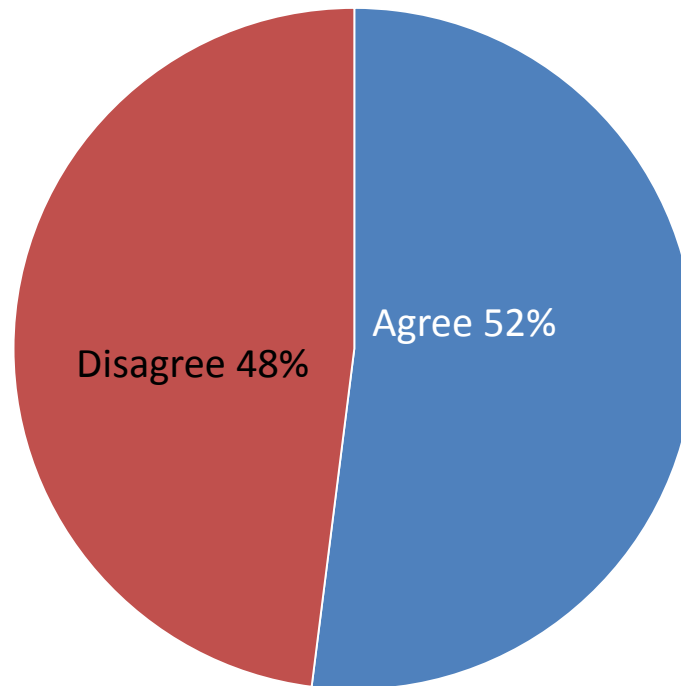
T22. When measuring your businesses laundry costs, what line items do you use? (CHOOSE ALL THAT APPLY)

T23. If you had to guess, on average how much per month does it cost to process your laundry?

Education needed on the environmental benefits of outsourcing laundry.

**Statement Agreement Among Those With An Opinion  
Among Hospitality Business Decision Makers**

***“Outsourcing laundry is better for the environment because it uses less resources such as water and energy.”***

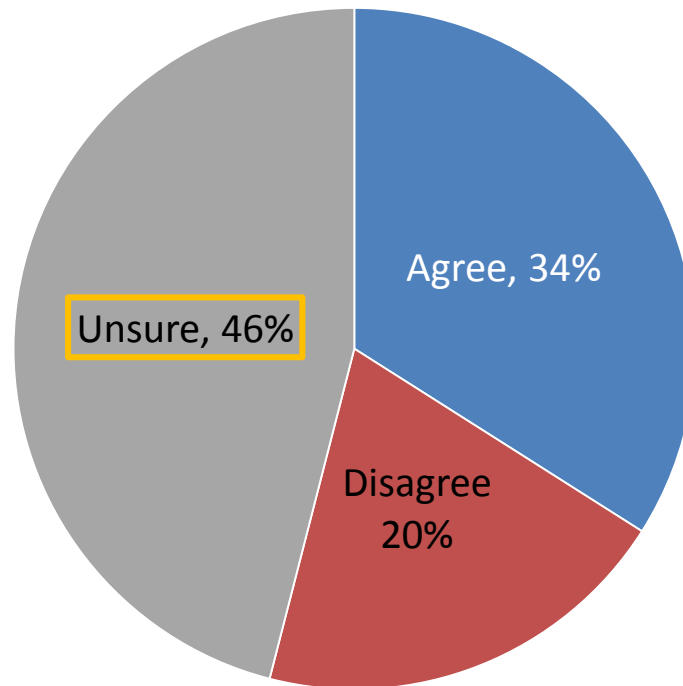


T25. Next you'll see a series of statements about contracting reusable textiles. For each of these, please indicate whether – based on your experience – you would agree or disagree with the statement. Outsourcing laundry is better for the environment because it uses less resources such as water and energy.

Nearly half of hotels interviewed are unsure if renting textiles are a significant tax benefit.

**Statement Agreement**  
**Among Hospitality Business Decision Makers**

***“When hotels own items such as sheets, towels, and bedding they are losing significant tax value from writing off rentals.”***



T26. Next you'll see a series of statements about contracting reusable textiles. For each of these, please indicate whether – based on your experience – you would agree or disagree with the statement. Outsourcing laundry is better for the environment because it uses less resources such as water and energy.

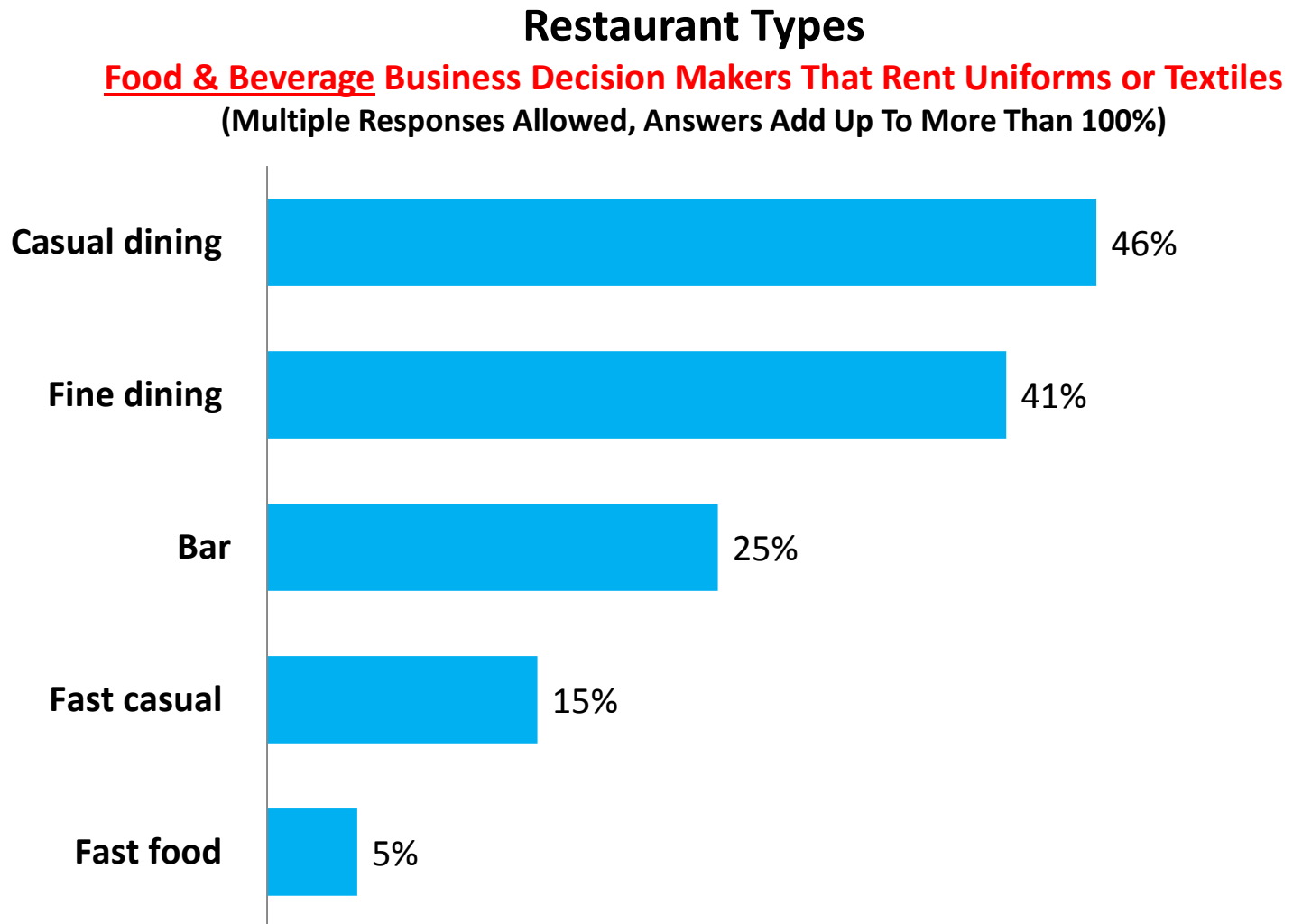
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## Food & Beverage Specific Questions



Casual and Fine dining restaurants are the most represented establishments.

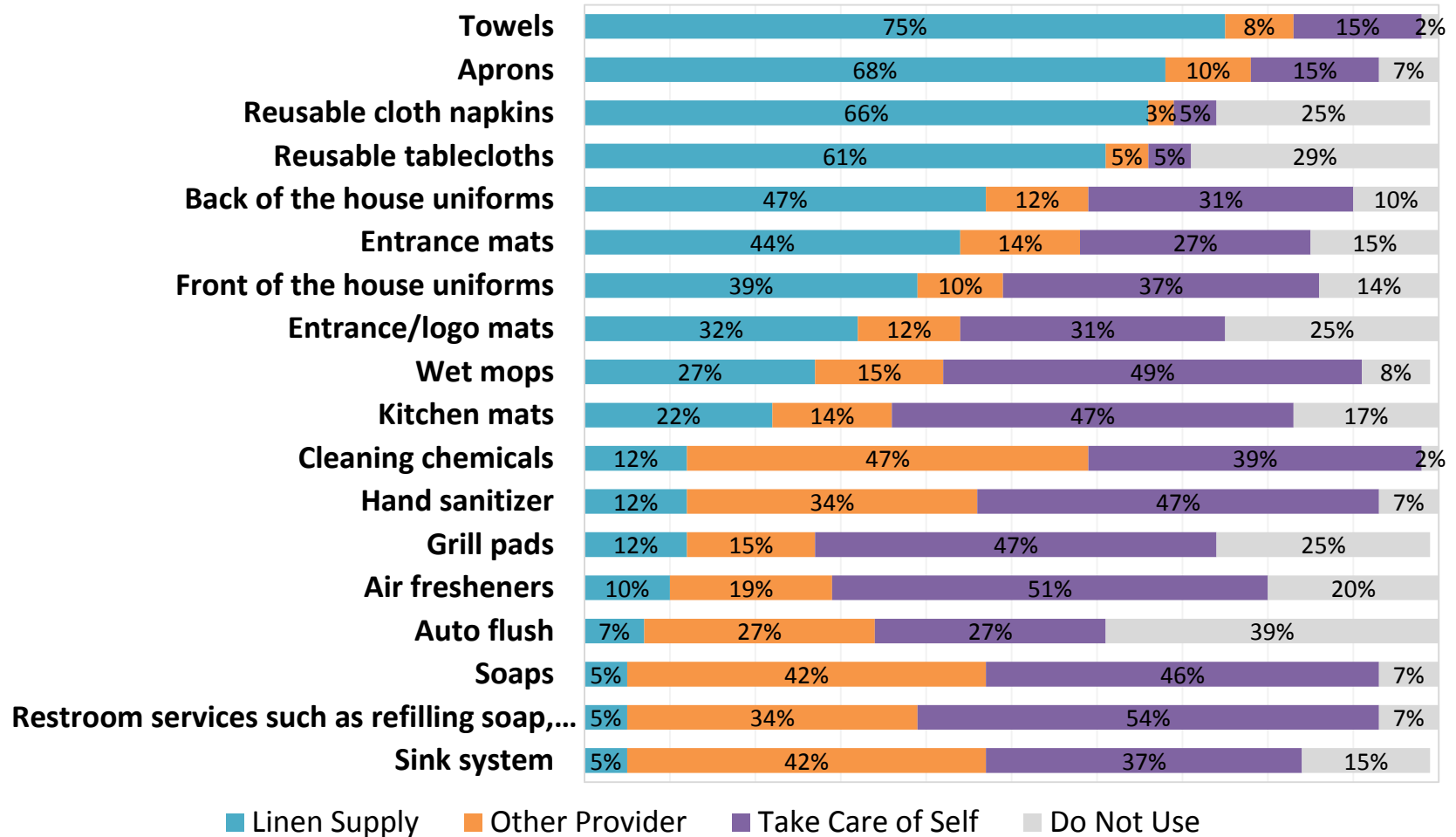


F1. Which of the following best describes the type of restaurant or restaurants in which you work?

# Food & Beverage Product Use & Supplier

## Products Use & Supplier

### Food & Beverage Business Decision Makers That Rent Uniforms or Textiles



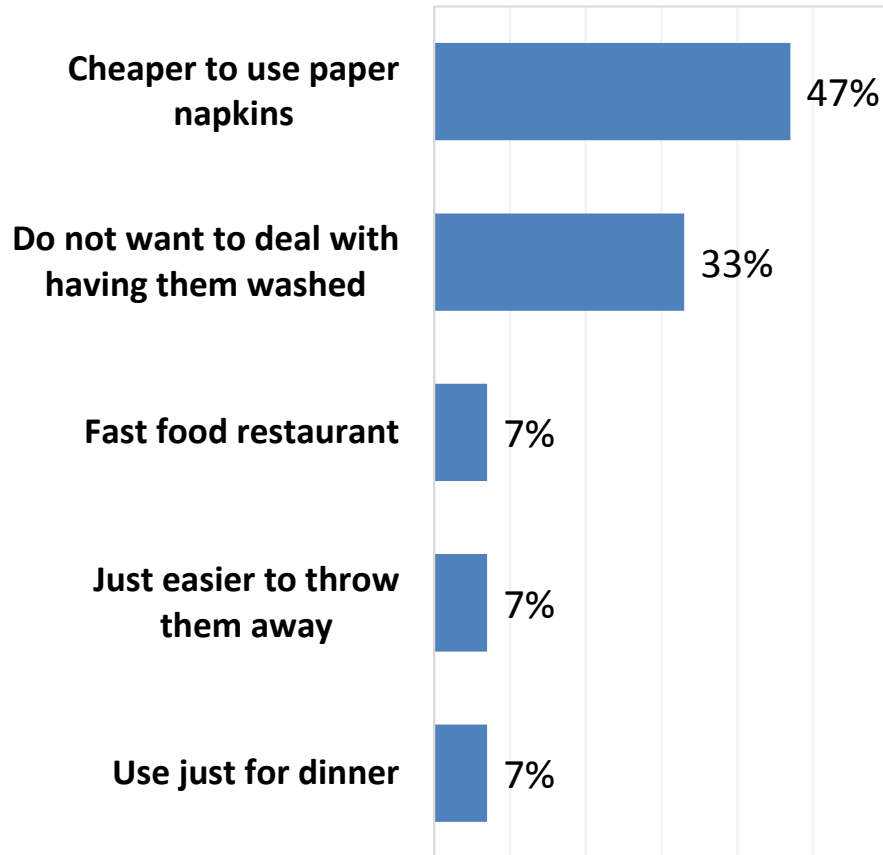
F2-19. Please indicate whether any of your restaurants contract for the product or service listed, and if so, please indicate if you contract that product through your linen supply provider or another provider. If your restaurant does not use the product please just indicate so.

Cost and convenience are the most frequent reasons for not using reusable napkins. Style is the top reason for not using reusable tablecloths.

**Food & Beverage Business Decision Makers That Rent Uniforms or Textiles**

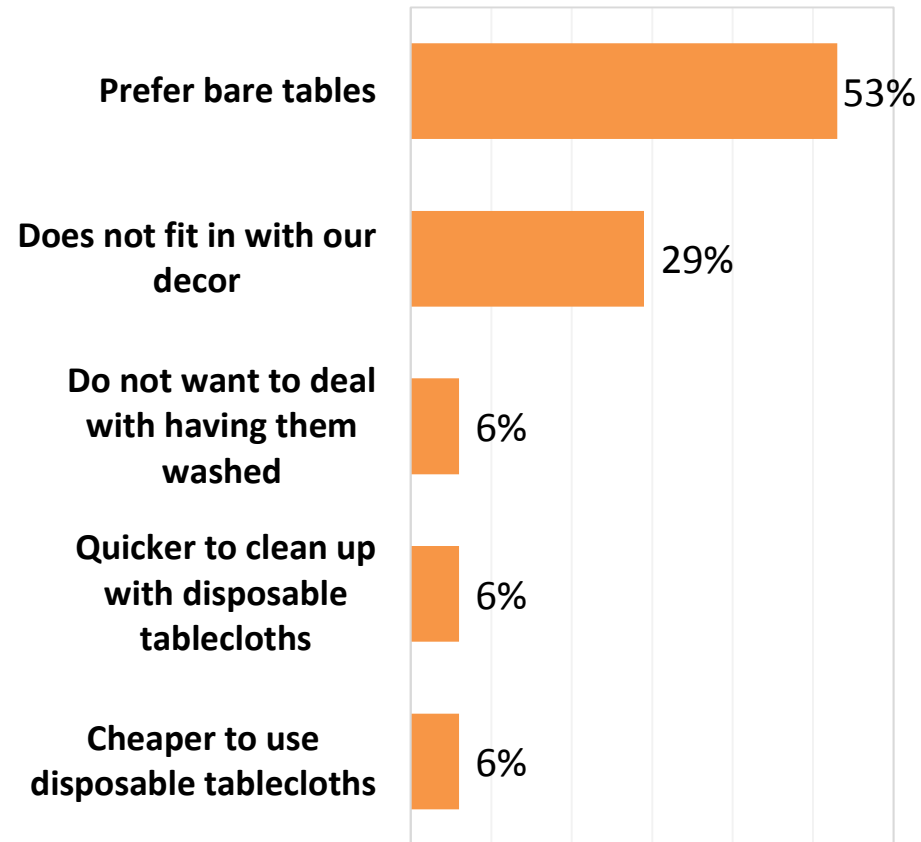
**Reasons Not Using Reusable Napkins**

(n15)



**Reasons Not Using Reusable Tablecloths**

(n17)



F20. Which of the following comes closest to the main reason you are not using cloth napkins?

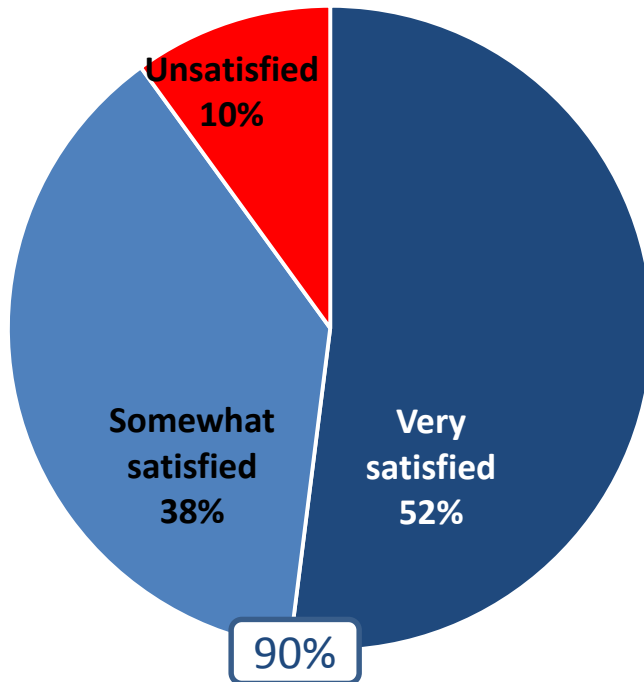
F21. Which of the following comes closest to the main reason you are not using reusable tablecloths?

Almost all restaurants that contract a linen provider are satisfied with the quality of the textile products and facility services. In fact, a majority are very satisfied with their service.

### Food & Beverage Business Decision Makers That Rent Uniforms or Textiles

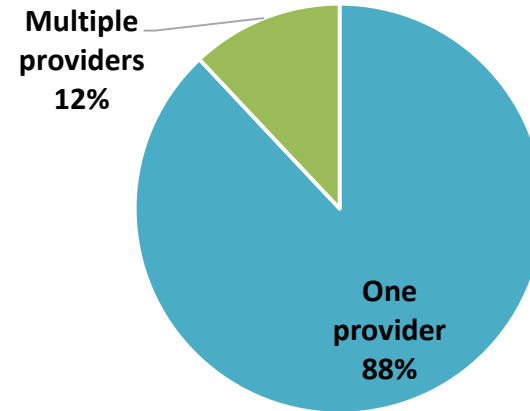
#### Textile Provider Satisfaction

(n42 Has Textile Contract)



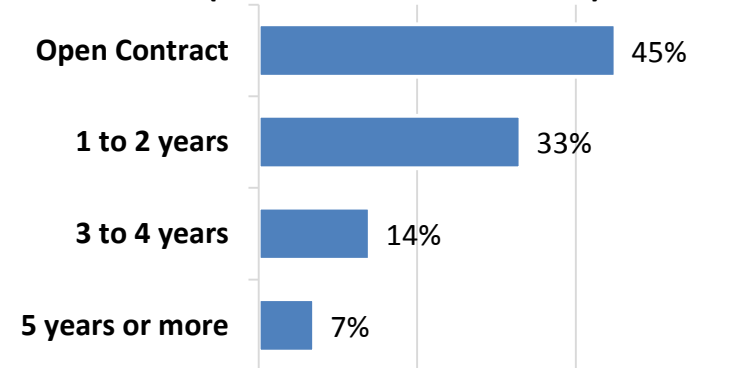
#### Number of Textile Providers

(n42 Has Textile Contract)



#### Linens Contract Length

(n42 Has Textile Contract)



F24. Overall, how satisfied are you with the quality of your reusable textile products and facility services?

F23. Do you use one or multiple providers for your reusable textile products?

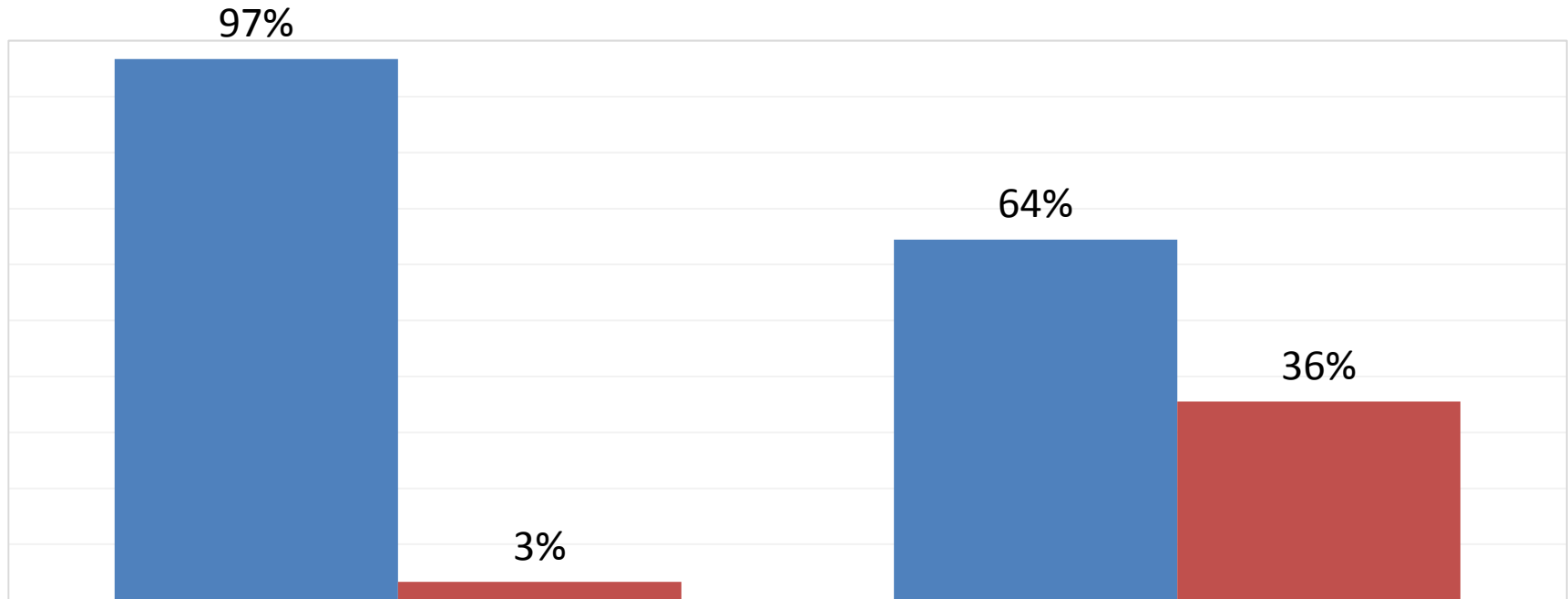
F22. When you first signed the linen contract how many years did the contract cover?

Restaurants save time and money by renting reusable linens.

Two thirds of these businesses with an opinion, agree that customers are willing to spend more money at a restaurant that uses reusable tablecloths and napkins.

### Statement Agreement Among Those With An Opinion

#### Food & Beverage Business Decision Makers That Rent Uniforms or Textiles



**Restaurants save time and money when renting reusable linens by eliminating costs for inventory, laundry, and man-hours to manage the process.**

**Customers are willing to spend more money at a restaurant that uses reusable tablecloths and napkins.**

■ Agree ■ Disagree

F25-26. Next you'll see a series of statements about contracting reusable textiles. For each of these, please indicate whether – based on your experience – you would agree or disagree with the statement.

Fabrizio Ward+



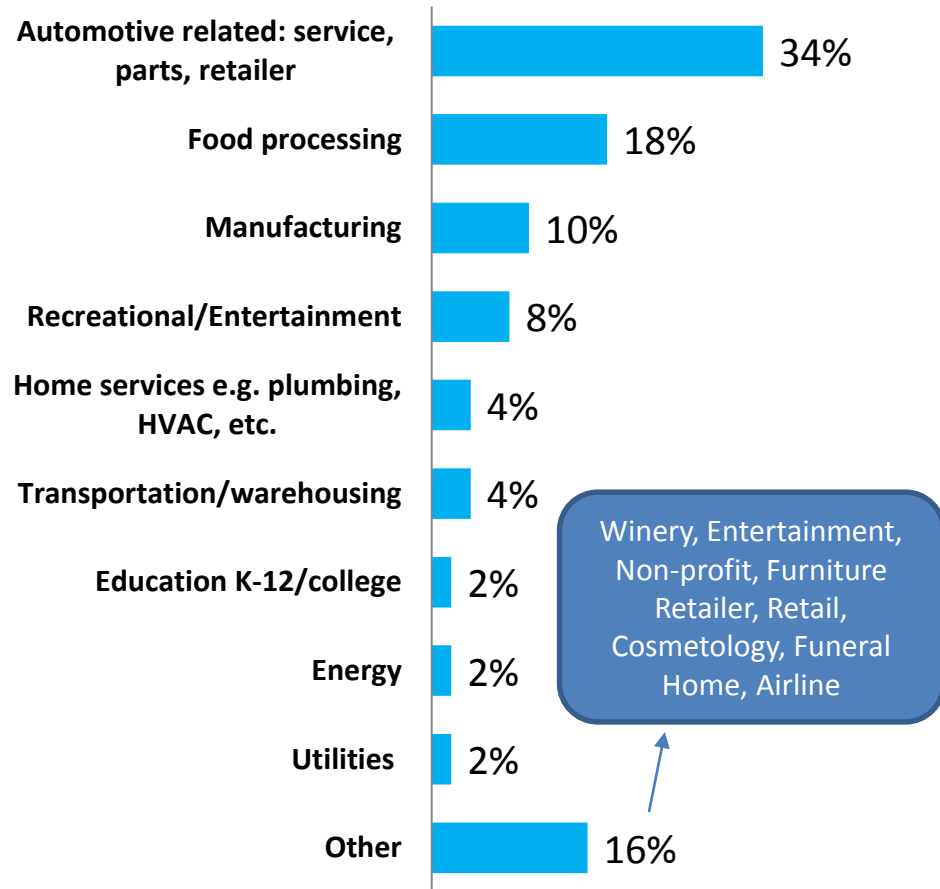
## Industrial Specific Questions

Automotive related businesses are the most prevalent industrial sector companies followed by food processing and manufacturing.

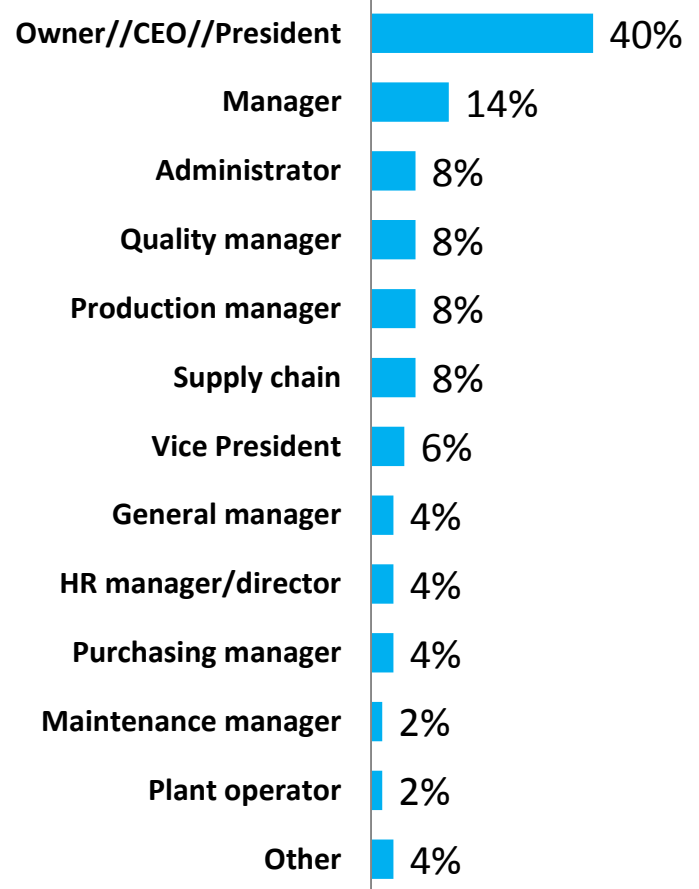
Two in five interviews are with the Owner/CEO/President of the company.

**Among Industrial Business Decision Makers That Rent Uniforms or Textiles**

**Work Place**



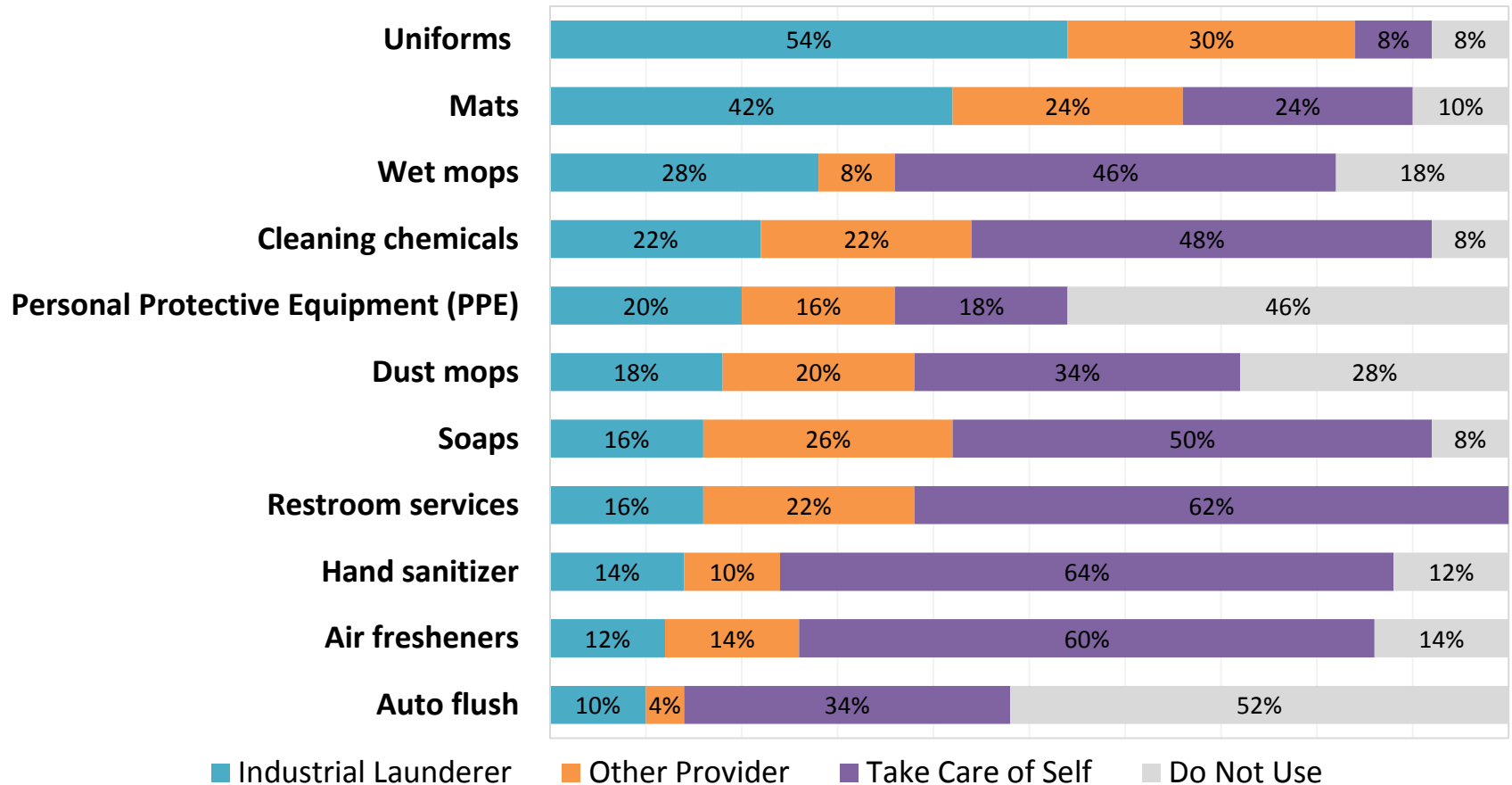
**Position**



N1. Which of the following best describes your type of business?  
 N2. Which, if any, of the following describes your position at work?

## Product Usage & Supplier

### Industrial Business Decision Makers That Rent Uniforms or Textiles



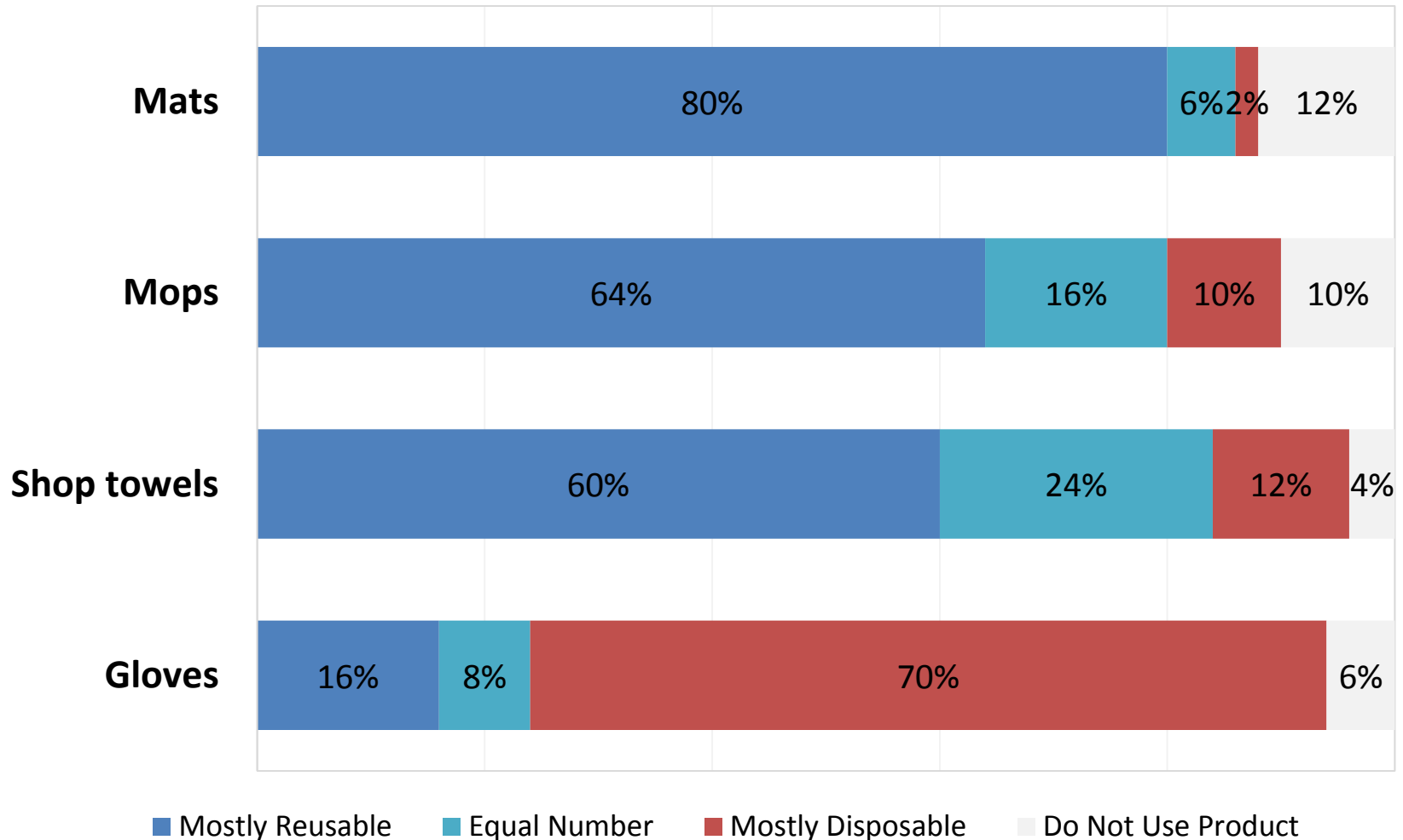
N3-13. Please indicate whether any of your locations contract for the product or service listed, and if so, please specify if you contract that product through your industrial launderer or another provider. If you do not use the product please just indicate so.



# Industrial Reusable & Disposable Product Use

## Product Use & Type

**Industrial Business Decision Makers That Rent Uniforms or Textiles**

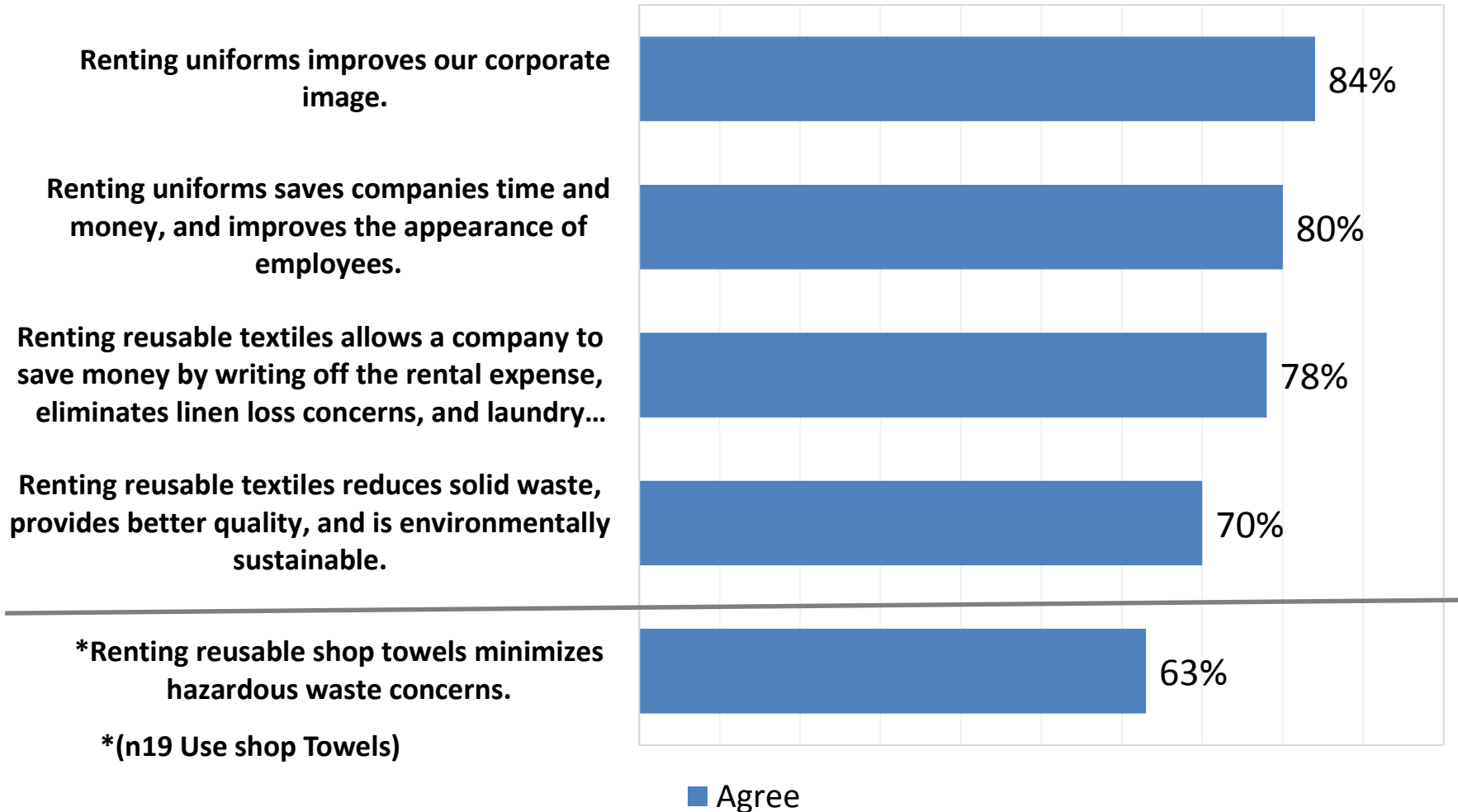


N14-17. The following contains a number of products that your facility may use. Please indicate whether you use reusable products (such as a cloth towel that can be washed) or disposable products (such as a paper towel that can be thrown away). If you do not use the product please just indicate so.

Most agree with the benefits of renting uniforms and reusable textiles.

## Statement Agreement

### Industrial Business Decision Makers That Rent Uniforms or Textiles



N18-22. Next you'll see a series of statements about contracting reusable textiles. For each of these, please indicate whether it describes your experience.

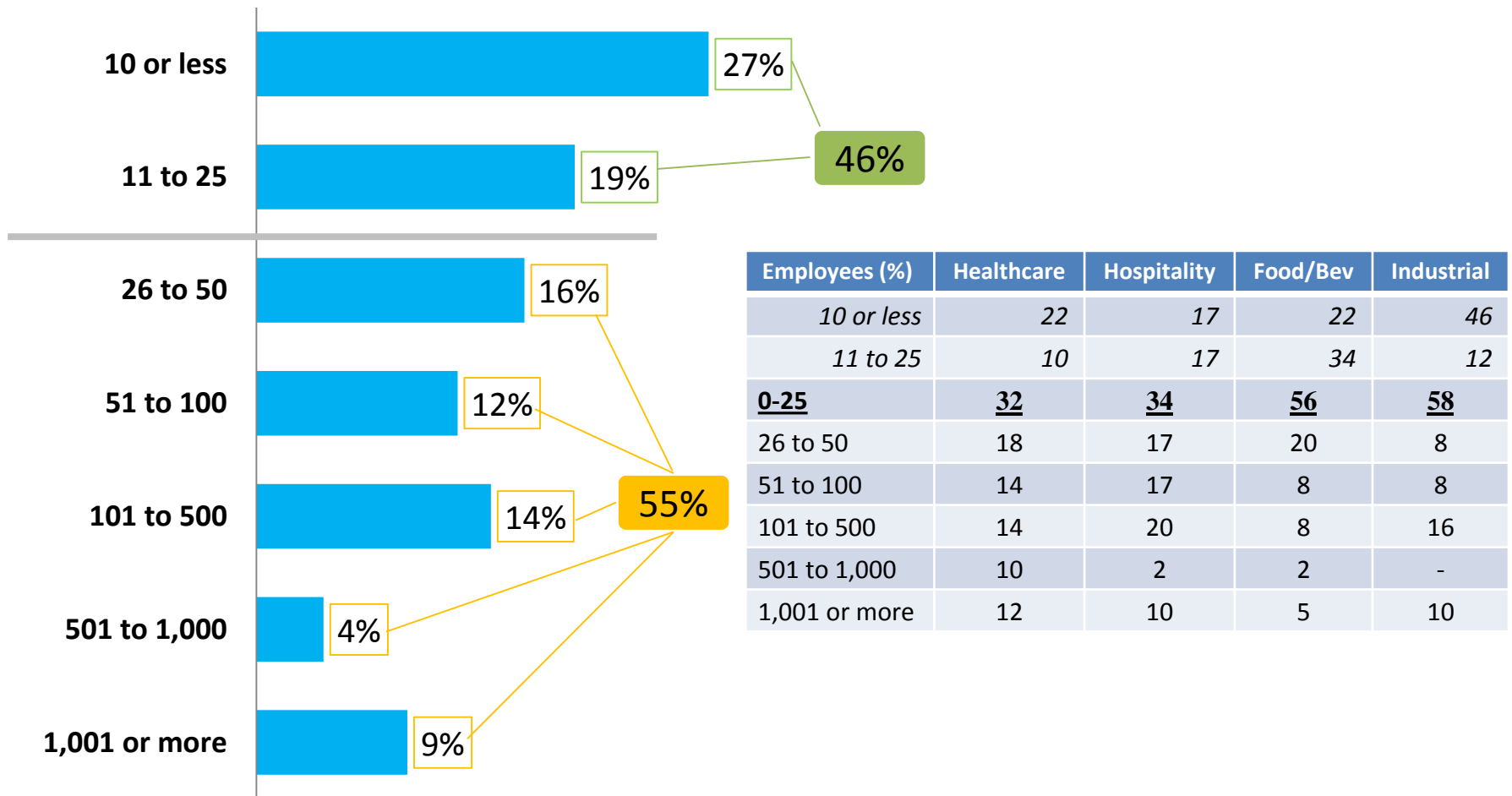
Fabrizio Ward +



## Appendix

More than half of these surveys are from businesses with more than 25 employees.

## Number of employees Among Business Decision Makers



Q9. How many employees do you have at your location/office?