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Business to Business Survey of Uniform and Textile Rental Decision
Makers

March 2015

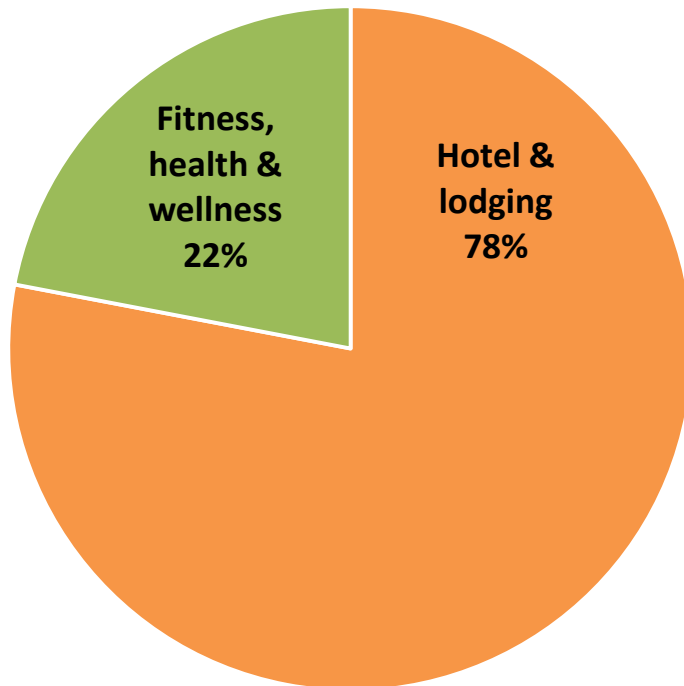
Methodology

- 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

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

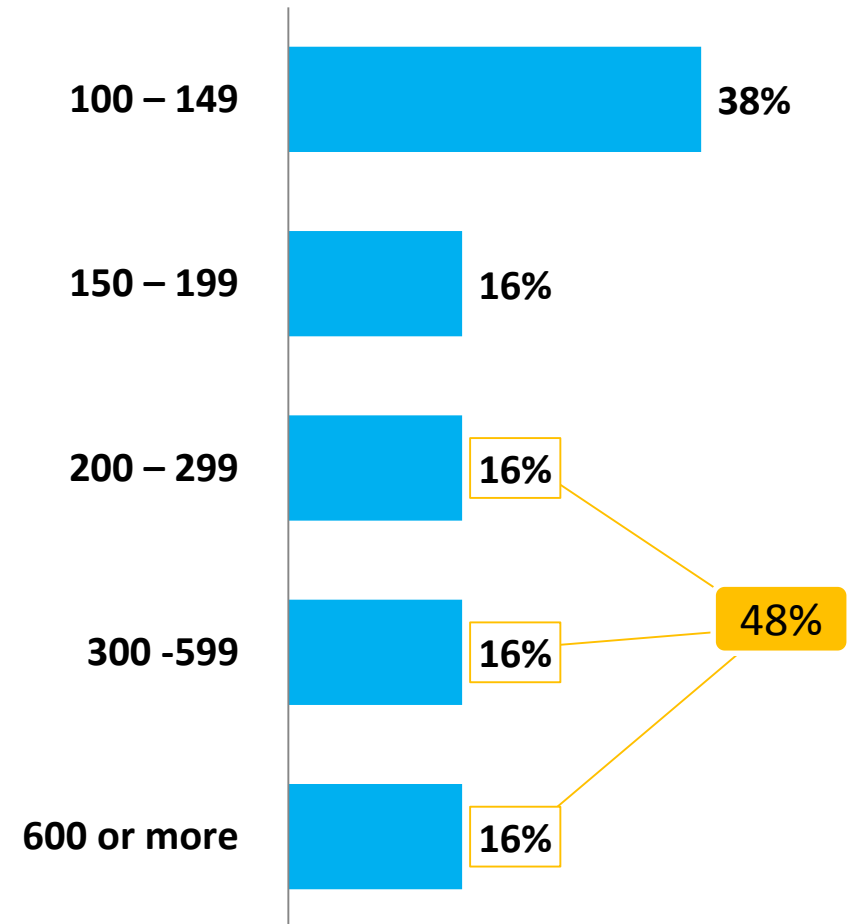
Among Hospitality Business Decision Makers

Hospitality Industry Type



Hotel Rooms

(n32 Hotel Rooms)



Q1. Which industry does your business fall into?

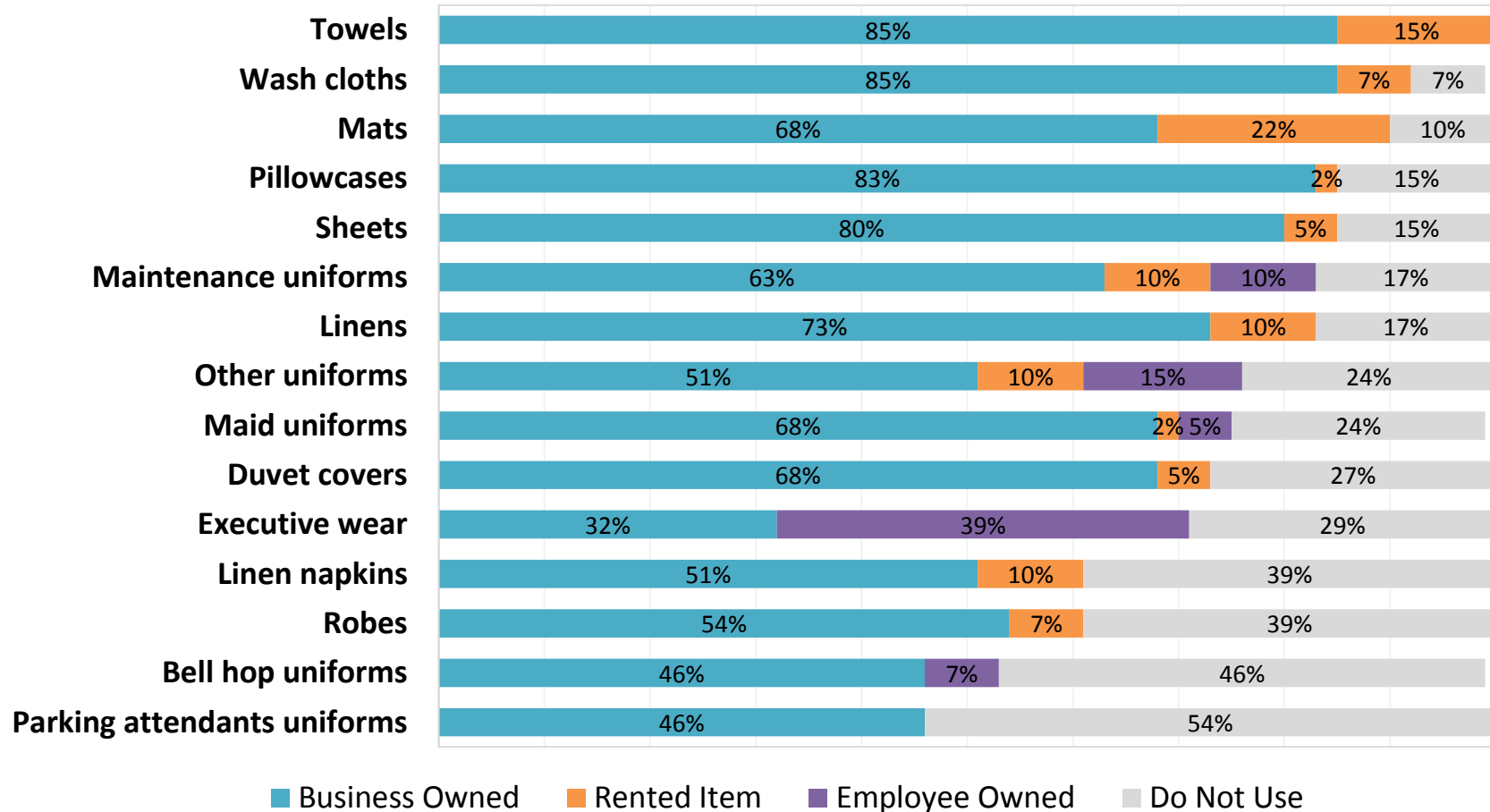
T1. How many hotel rooms does your property have?

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.

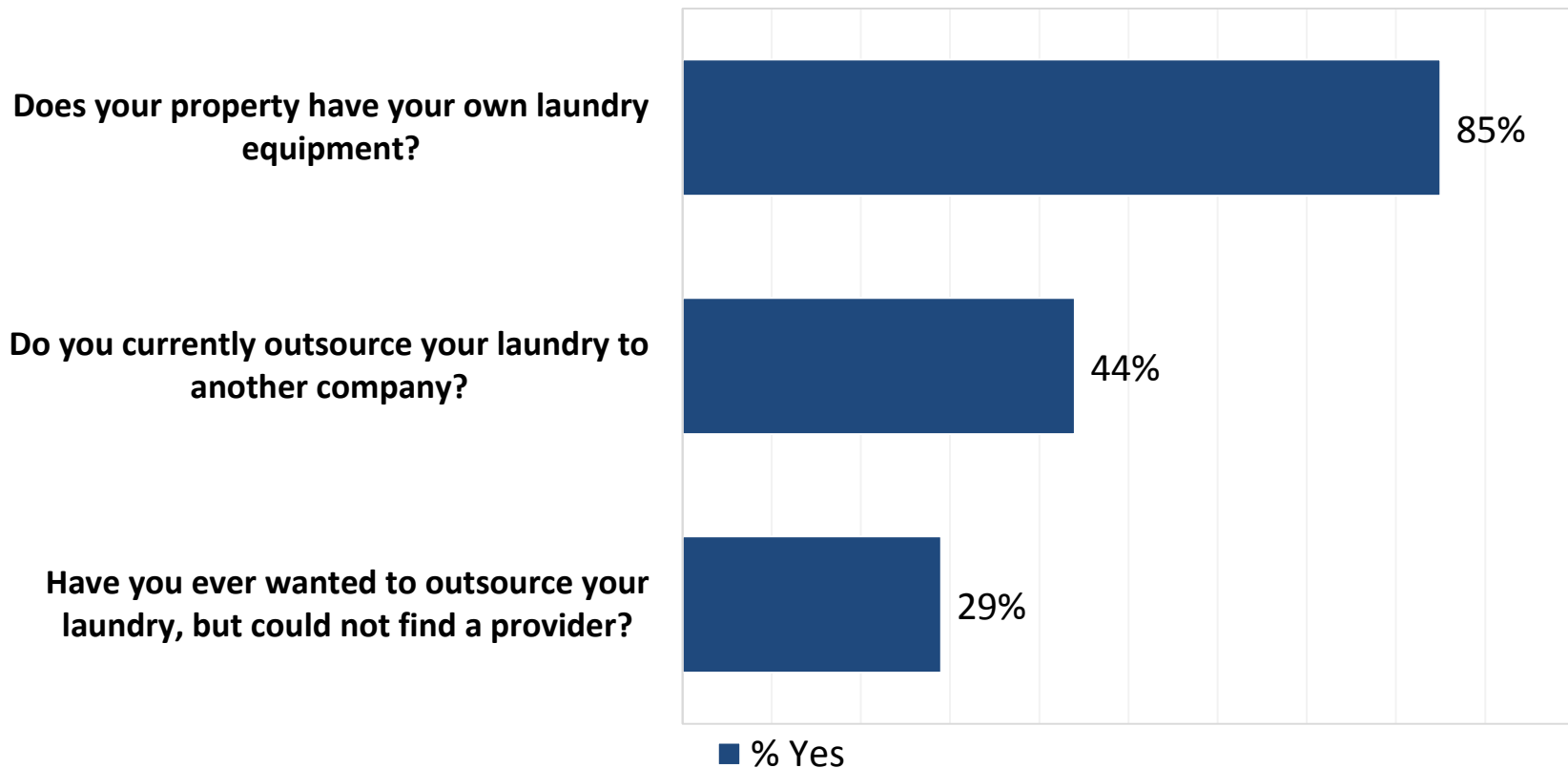
T11-16. The following contains a number of garments that employees may use. Please indicate whether the business owns the garment, the employee owns the garment, or whether the product is rented. If your company does not use the garment please just indicate so.

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



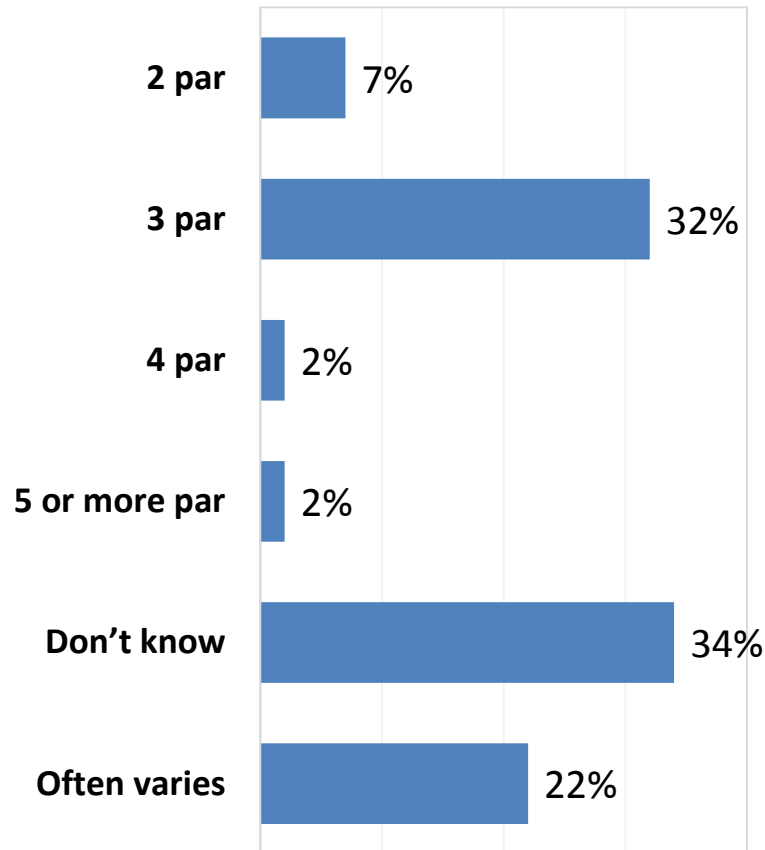
T17-20. Please indicate the response that most accurately reflects your situation.

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

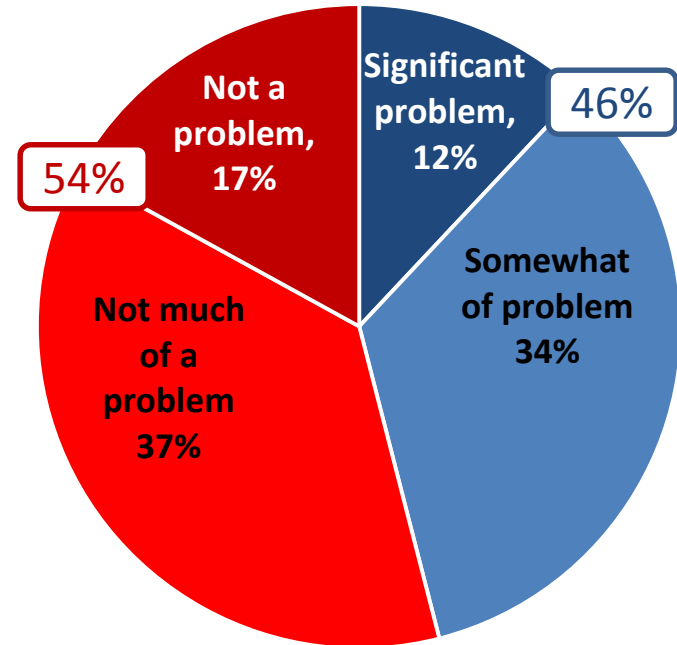
Half believe linen loss is a problem.

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?

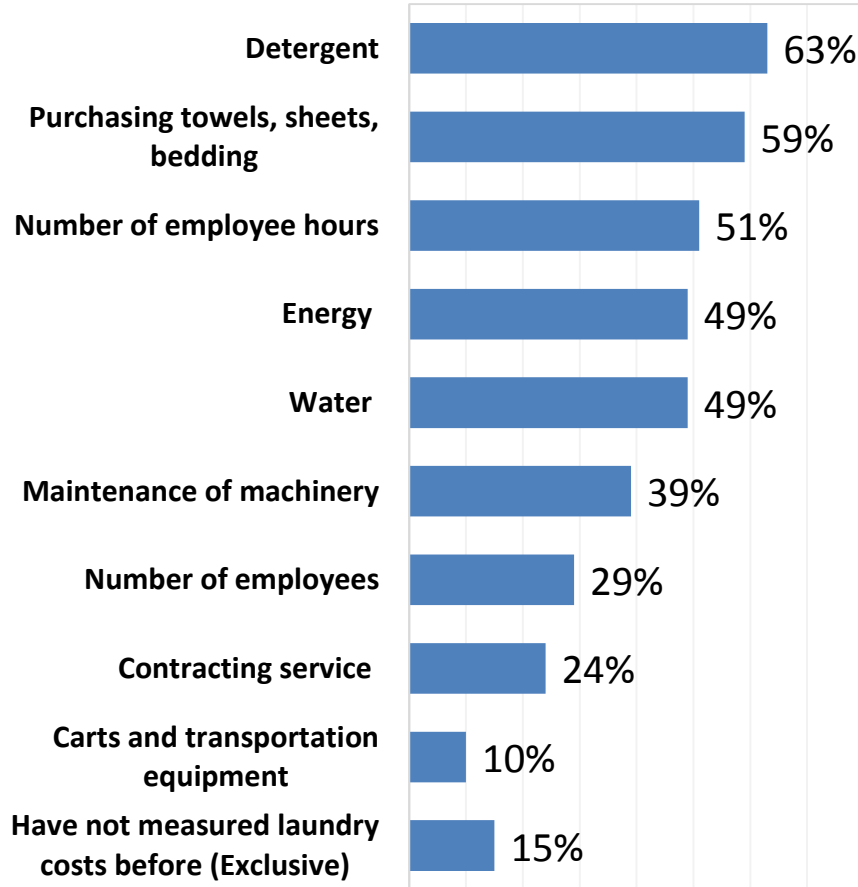
Detergent, textile purchases, employee hours, and energy & water costs are the most frequent factors in estimating laundry costs.

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

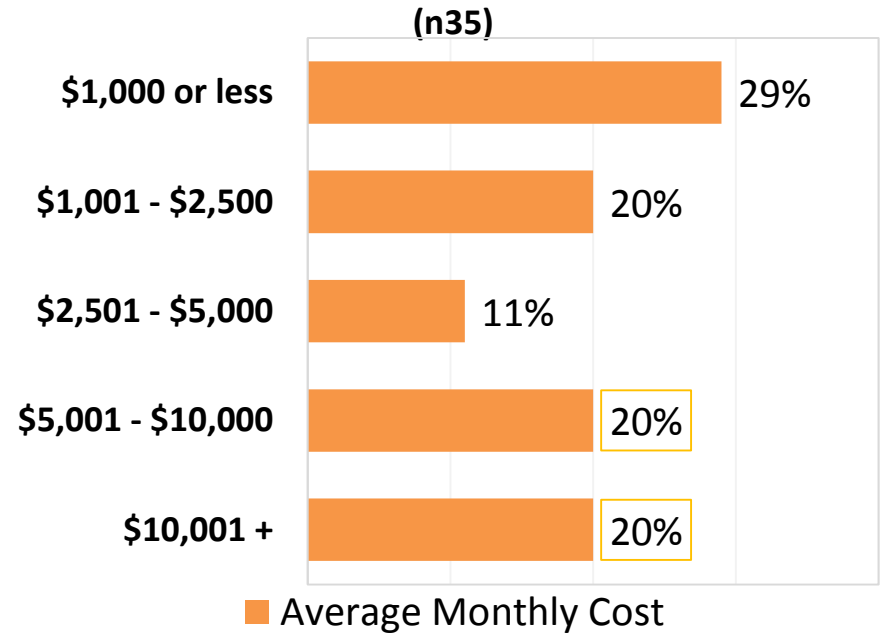
Among Hospitality Business Decision Makers

Factors in Estimating Laundry Costs

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



Estimated Monthly Laundry Cost



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

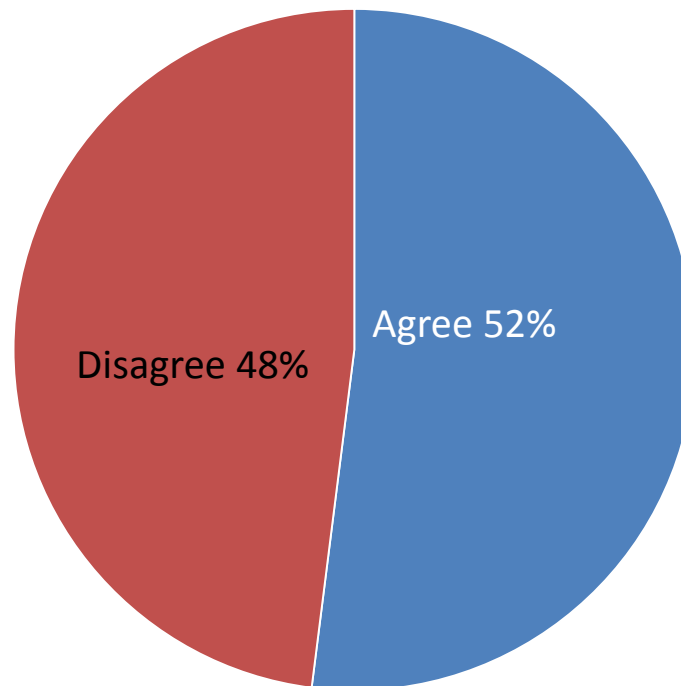
T22. When measuring your businesses laundry costs, what line items do you use? (CHOOSE ALL THAT APPLY)

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.”

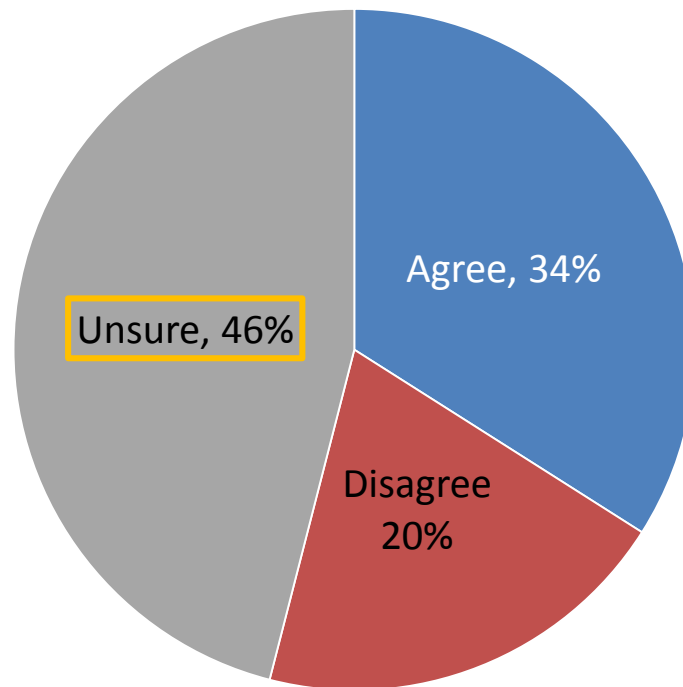


T25. Next you'll see a series of statements about contracting reusable textiles. For each of these, please indicate whether – based on your experience – you would agree or disagree with the statement. Outsourcing laundry is better for the environment because it uses less resources such as water and energy.

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.