

RESEARCH REPORT - USA

January 2021



Respecting People. Impacting Business.®

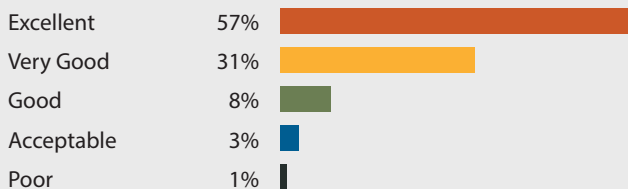
Express Employment Professionals
9701 Boardwalk Blvd
Oklahoma City, OK 73162

Overall Quality

99%*

In one all-encompassing question we ask the franchisee to rate the quality of the franchisor. This question provides insight (without any specifics or qualifiers) about their overall impression of the franchise.

Q: In general, how would you rate the overall quality of your franchisor? (n= 352)

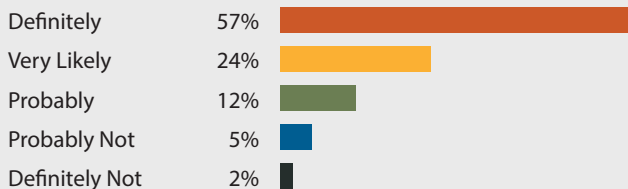


Invest Again

93%*

This question is extremely important when evaluating a franchise. However, occasionally a franchisee will rate this question low because the concept has changed significantly since they purchased the franchise, or because of personal issues.

Q: Knowing what you know now, and if you had to do it all over again, would you invest in this franchise? (n=351)

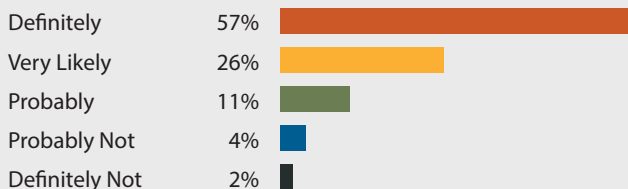


Recommend to Others

94%*

When evaluating franchise investments, it is extremely important that existing franchisees (when asked confidentially) will recommend the franchise to prospective franchisees.

Q: Would you recommend this franchise to a prospective franchisee? (n= 352)



(n=#) represents the total respondents that answered each specific question.

*Combined scores of all positive responses

-A, B, and C

-Definitely, Very Likely, and Probably

-Exceeded My Expectations and Met My Expectations

-Excellent, Very Good, Good, and Acceptable

-Strongly Agree and Agree

-Strongly Agree, Agree, and I am not aware of any

disagreements

RESEARCH REPORT

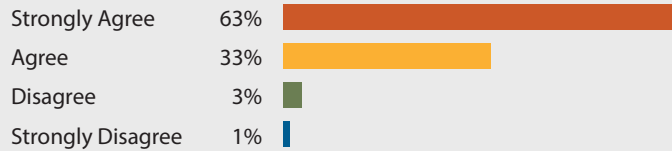
Relationship with the Franchisor

Long-Term Commitment

96%*

From the point of view of the franchisee; is there a commitment on the part of the franchisee and the franchisor for a "positive, long-term" franchise relationship?

Q: My franchisor and I are committed to a positive, long-term relationship. (n=334)

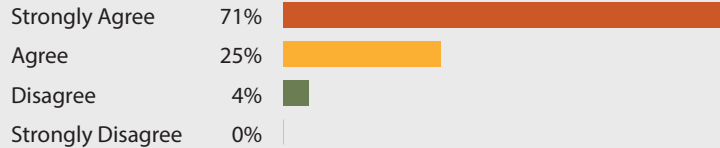


Joint Success

96%*

In the most successful franchise systems there is a very clear understanding of the interdependent relationship between the success of the franchisee and the franchisor. This question measures the level of confidence in the understanding of that concept by the franchisor.

Q: My franchisor understands that if I am successful, they will be successful. (n=336)

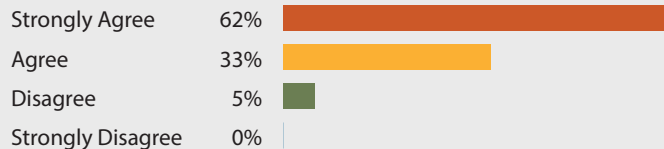


Franchisor Competence

95%*

Does the franchisee believe that the franchisor has the talent and skills necessary to assist the franchisee in succeeding? It is important that the franchisor not only have this ability, but also that their franchisees look to it for guidance and expertise.

Q: My franchisor is a competent, skillful organization which I can rely on for help. (n=337)



(n=#) represents the total respondents that answered each specific question.

*Combined scores of all positive responses
-A, B, and C
-Definitely, Very Likely, and Probably
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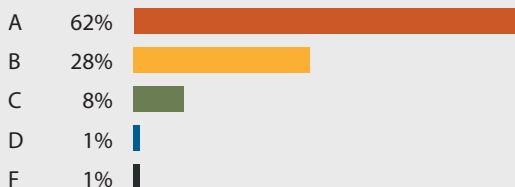
Training and Support

Initial Training

98%*

The initial training provided by the franchisor is crucial to the success of new franchisees. Every franchise provides some form of initial training, and the quality of this training is of tremendous importance to high-quality franchise companies.

Q: How would you grade the initial training supplied by the franchisor? (n=332)

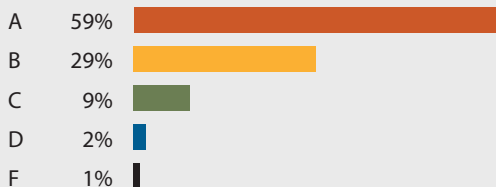


Opening Support

97%*

Opening support can be incredibly important in creating a customer's positive first impression of your business. However, this depends on the franchisee category and product or service offered. In many cases, the franchisor may be required to offer little or no opening support.

Q: How would you grade the initial opening support provided by the franchisor? (n=333)

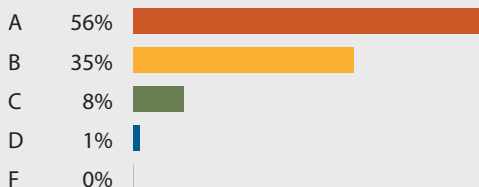


Ongoing Training and Support

99%*

While the importance of opening support can vary with the franchise category, the post-opening training and support provided by the franchisor is extremely important to franchisees' long-term success.

Q: How would you grade the ongoing training and support supplied by the franchisor? (n=334)



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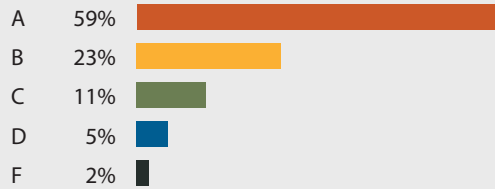
Helpfulness, Communication and Products/Services

Field Representatives

93%*

Almost every franchise system has individuals that are responsible for assisting franchisees when they have questions and/or problems. This question is designed to measure the helpfulness of these individuals.

Q: How would you grade the helpfulness of the franchisor's field representatives? (n=335)

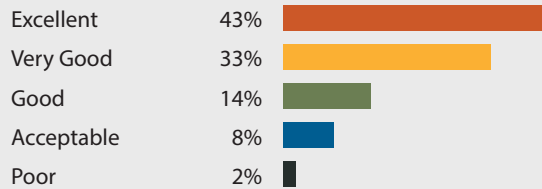


Overall Communication

98%*

We believe that quality communication is a critical aspect of successful franchising.

Q: How would you rate the overall communication between home office personnel and franchisees? (n=337)

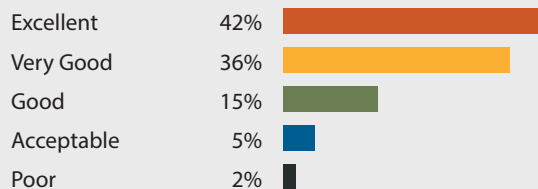


Product/Service Quality

98%*

In most systems, franchisees receive some type of products and/or services directly from the franchisor. This question asks the current franchisees to rate the quality of these products and/or services.

Q: How would you rate the quality of products and/or services received from your franchisor? (n=346)



(n=#) represents the total respondents that answered the specific question.

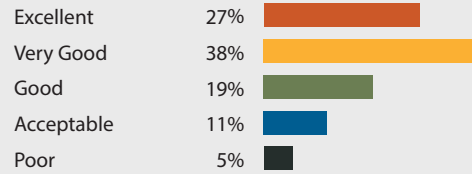
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New Product/Service Quality

95%*

Q: How would you rate the quality of NEW products and/or services received from your franchisor? (n=346)

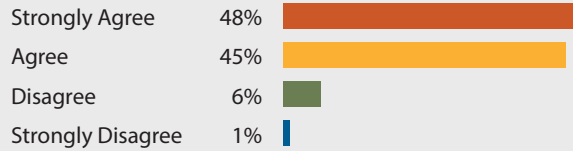


Problem Solving

93%*

This question measures the franchisee's perception of the effectiveness of the franchisor's ability to solve questions and problems in a timely manner.

Q: My franchisor responds in a timely way to my questions and minor problems. (n=337)

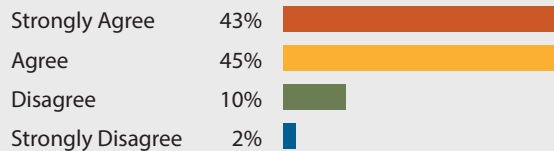


Communication with Senior Management

88%*

As we measure high-quality franchise organizations, one thing always stands out - the ability of franchisees to feel that they can directly interact with senior decision makers.

Q: I am able to communicate directly and effectively with senior management. (n=335)



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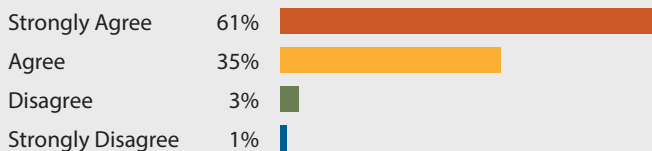
Management

Performance Standards

96%*

High-quality franchising requires high standards throughout the system. Leadership for these standards starts at the top.

Q: My franchisor encourages high standards of quality performance throughout the organization. (n=346)

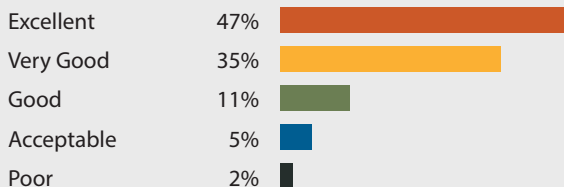


Opportunity

98%*

Without any qualification, how the franchisee rates the overall opportunity of the franchise they have chosen tells us a great deal; especially when considered along with the next two questions.

Q: In general, how would you rate the opportunity provided by this franchise system? (n=346)

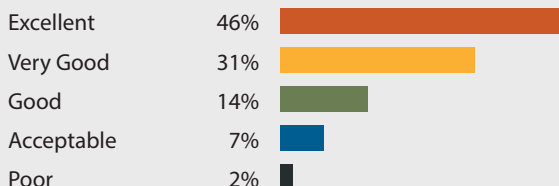


Growth Potential

98%*

Now we ask about the franchise opportunity, but qualify the question by focusing on long-term growth potential. This offers insight as to the franchisees' perspective on this very important topic.

Q: How would you rate the long-term growth potential for your franchise business? (n=347)



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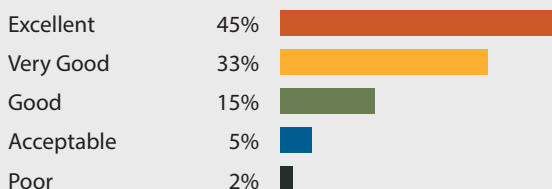
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Local Competition

98%*

Once again, we focus on the opportunity provided by the franchise, asking the franchisees to rate their franchise business compared to local competition.

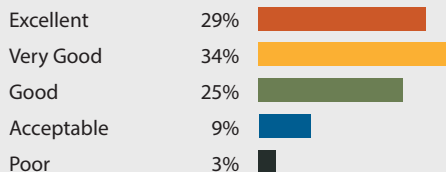
Q: How would you rate your franchise business compared to the local competition? (n=346)



Communications

97%*

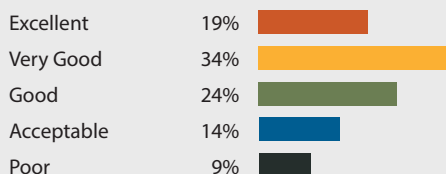
Q: How would you rate the communication and public relations campaigns (bylined articles, blogs, national news interviews, whitepapers, etc.) received from your franchisor? (n=334)



Quality of Advertising

91%*

Q: How would you rate the quality of advertising (print, online, T.V., radio, outdoor, etc.), marketing (collateral, campaigns, videos, etc.) and promotional products (items available through Robyn) received from your franchisor? (n=334)



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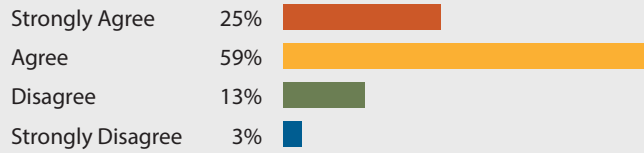
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Social Media and Technology

Social Media

84%*

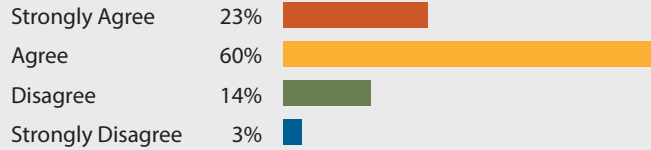
Q: My franchisor provides effective social media branding assets and training. (n=334)



Social Media Recruiting

83%*

Q: My franchisor provides effective social media recruiting and advertising tools and training. (n=332)

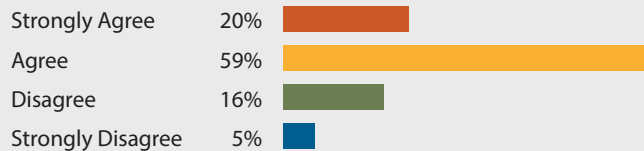


Technology

79%*

Does the franchisor's use of technology effectively support franchisees?

Q: My franchisor effectively uses technology to help me manage and improve my business. (n=333)



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RESEARCH REPORT

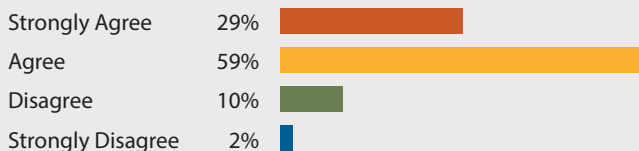
Websites and Innovation

Public Website

88%*

Is the franchisor's public website helpful and useful in promoting the franchise brand?

Q: My franchisor maintains a helpful and useful public website. (n=332)

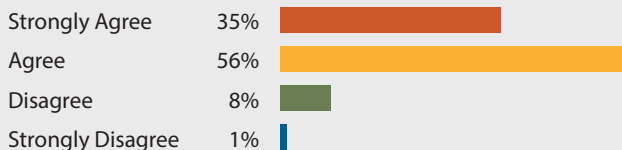


Internal Website

91%*

Is the franchisor's internal website user-friendly and does it provide helpful information to franchisees?

Q: My franchisor maintains a helpful and useful internal website. (n=332)

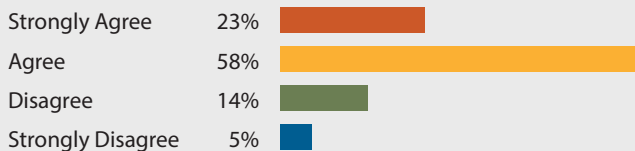


Innovation

81%*

In the best franchise systems, franchisors look to the future and make innovation a priority.

Q: My franchisor's research and development (innovation) efforts help us to be competitive in the marketplace. (n=333)



(n=#) represents the total respondents that answered each specific question.

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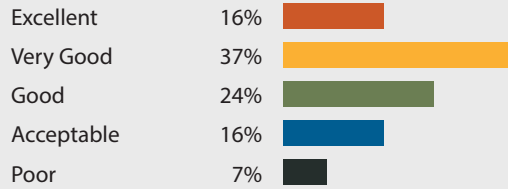
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Q4, Express Digest, and Live Broadcasts

Q4

93%*

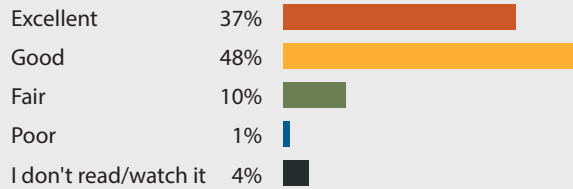
Q: How would you rate the effectiveness and ease of Q4?
(n=334)



Express Digest

95%*

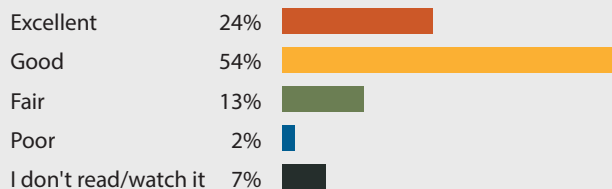
Q: How would you rate your Communication Channels from Headquarters: Express Digest (n=334)



Live Broadcasts

91%*

Q: How would you rate your Communication Channels from Headquarters: Live Broadcasts (n=333)



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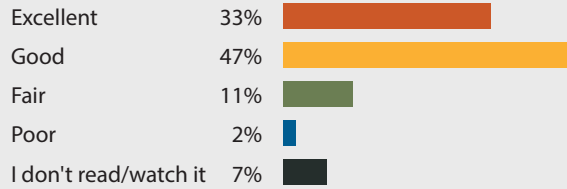
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Bill's Live Stream and Developer

Bill's Live Stream

91%*

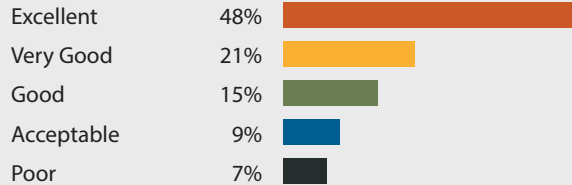
Q: How would you rate your Communication Channels from Headquarters: Bill's Live Stream (n=332)



Developer-Overall Satisfaction

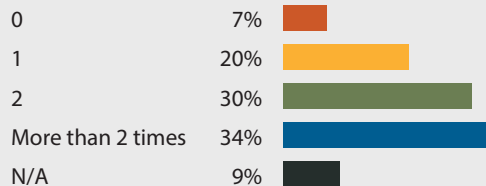
93%*

Q: How would you rate the overall satisfaction of your Developer? (n=332)



Developer Annual Visits

Q: How frequently are you visited by your Developer annually? (n=333)



(n=#) represents the total respondents that answered each specific question.

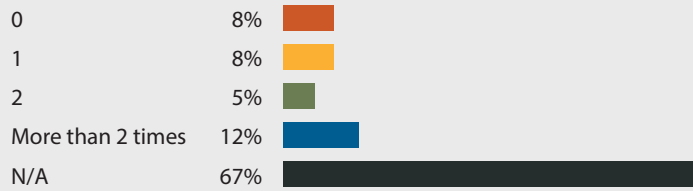
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Developer

Developer's Rep Annual Visits

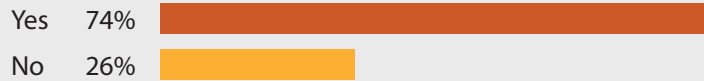
Q: How frequently are you visited by your Developer Rep annually, if applicable? (n=332)



Developer Assistance

74%*

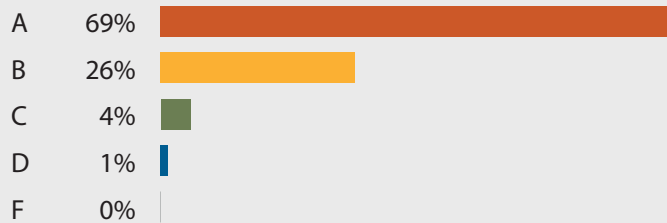
Q: Does your Developer assist you in interviewing internal staff? (n=333)



Developer-Interviewing

99%*

Q: How would you grade your Developer in interviewing your internal staff?(n=243)



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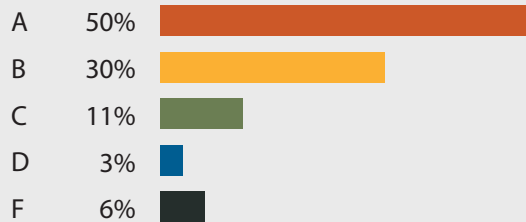
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Developer

Developer-Overall Business Goals

91%*

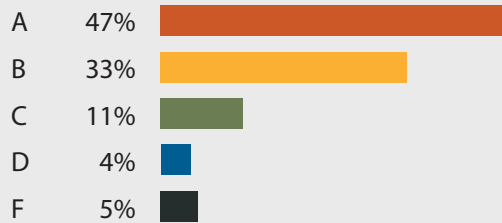
Q: How would you grade your Developer in helping you achieve your overall business goals?(n=330)



5 Sales Plays Coaching Skills

91%*

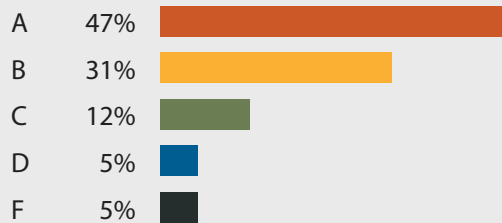
Q: How would you grade your Developer in coaching you on the 5 Sales Plays Coaching Skills?(n=330)



Staffing Solutions

90%*

Q: How would you grade your Developer in applying staffing solutions to your market?(n=330)



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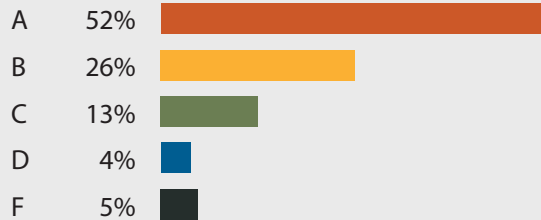
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Developer and Franchisee Success

Applying Aspects of Company

91%*

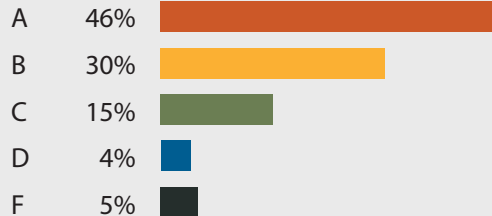
Q: How would you grade your Developer's assistance/ability in applying all aspects of the company to your market? (n=328)



SLII Coaching Skills

91%*

Q: How would you grade your Developer in SLII Coaching Skills? (n=325)

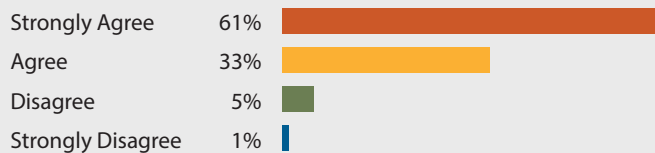


Franchisee Success

94%*

Does the franchisee believe that their success is a major concern on the part of the franchisor?

Q: My franchisor cares about franchisee profitability and SUCCESS. (n=336)



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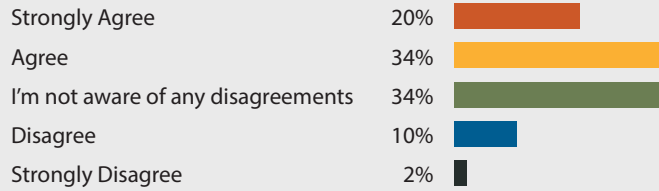
Conflict Resolution, Communication and COVID-19

Conflict Resolution

88%*

Disagreements between franchisors and franchisees are not uncommon; the most effective franchisors resolve these conflicts quickly.

Q: My franchisor is effective in resolving disagreements with franchisees. (n=336)

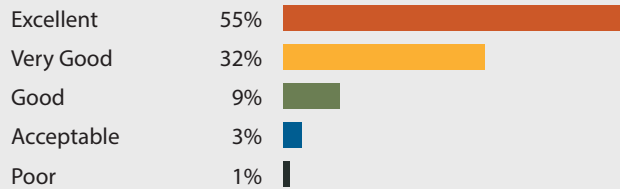


Franchisee Communication

99%*

Healthy franchise systems have franchisees that work well with one another. They don't look to the franchisor to have all the answers, and they feel comfortable communicating with one another, sharing information and assisting their fellow franchisees.

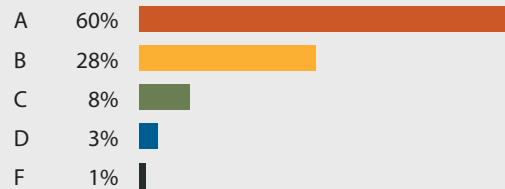
Q: How would you rate the helpfulness and communication between fellow franchisees? (n=335)



COVID-19

96%*

Q: How would you grade your franchisor's overall response to the COVID-19 Pandemic? (n=325)



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Conference

Conference Attendance

90%*

Q: Have you attended a International Leadership Conference sponsored by your franchisor in the past two years? (n=326)

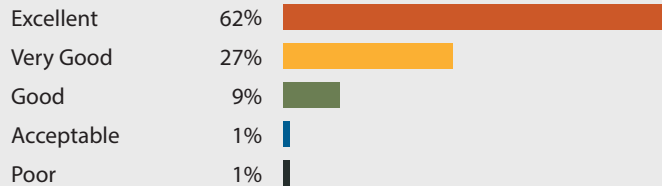


Conference Quality

99%*

Only those that had attended a convention in the last two years were asked this quality question.

Q: Please rate the overall quality of the Conference. (n=292)

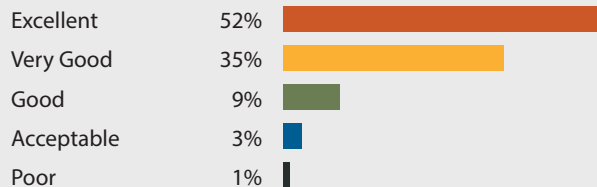


Networking

99%*

Conventions often provide opportunities for franchisees to network with one another: do franchisees think that there was enough?

Q: Please rate the quality and quantity of the networking opportunities available at the Conference. (n=293)



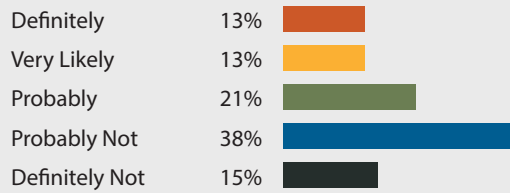
(n=#) represents the total respondents that answered each specific question.

*Combined scores of all positive responses
-A, B, and C
-Definitely, Very Likely, and Probably
-Exceeded My Expectations and Met My Expectations
-Excellent, Very Good, Good, and Acceptable
-Strongly Agree and Agree
-Strongly Agree, Agree, and I am not aware of any disagreements

Additional Franchises

47%*

Q: Do you plan to open additional stores, outlets or territories of this franchise? (n=325)



Veteran Status

Q: Are you a Veteran? (n=324)



Investment Decision

Q: Please rank the following items in order of importance when you made your franchise investment decision. (With 1 being most important and 6 being least important) (n=354)

- 1st** Return on your Investment
- 2nd** Quality of the end product / service sold to customers
- 3rd** Availability of the franchise in your desired location
- 4th** Positive unit growth of the franchise
- 5th** Positive validation from existing franchisees
- 6th** The background / experience of the franchise executives

(n=#) represents the total respondents that answered each specific question.

*Combined scores of all positive responses
-A, B, and C
-Definitely, Very Likely, and Probably
-Exceeded My Expectations and Met My Expectations
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RESEARCH REPORT

Personal Profile

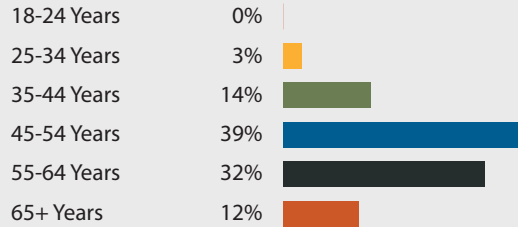
We ask five franchisee demographic profile questions. These five questions are intended to give the prospective franchise investor an overview of what the franchisees of this system "look like."

1. How many franchisees fall into the different age groups?
2. How long have franchisees owned their franchises?
3. How many stores, outlets or locations of this franchise do these franchisees own?
4. Prior to opening this franchise, how much business experience (not business ownership experience) did the individual have?
5. What level of education has the individual franchisee obtained?

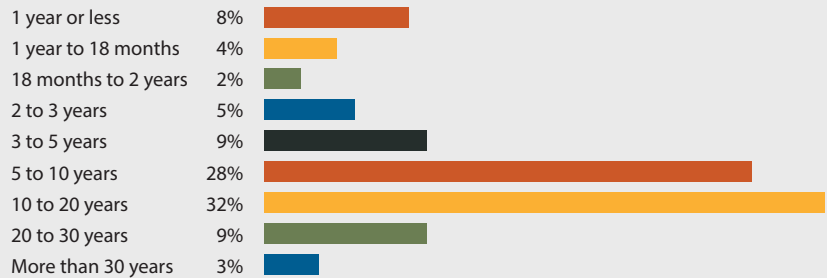
We understand that there are a huge number of questions that could be asked of franchisees in this area. However, our mission is to obtain the most useful information, certify the best franchise opportunities based on the experience and opinions of the franchisees and not bury the franchise investor with useless information.

This report is only one very important step in the due diligence process. If existing franchisees are supportive of the current franchise relationship and the support services provided by the company, and are excited about the future of their franchise business...you have found an opportunity definitely worth further investigation.

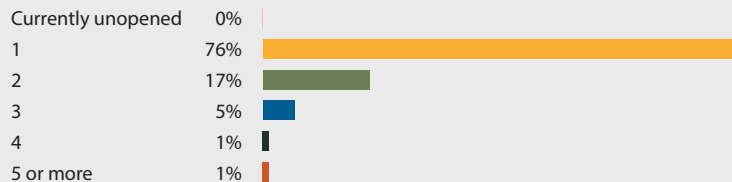
Q: Which age group do you fit in? (n=323)



Q: How long have you owned this franchise? (n=326)



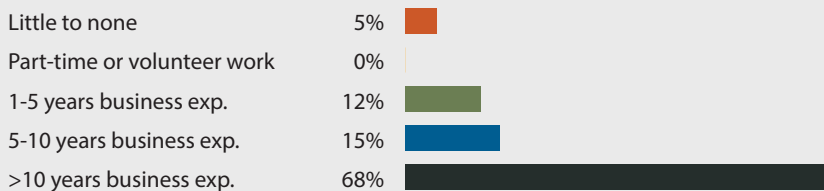
Q: How many stores, outlets, or territories of THIS franchise do you own? (n=325)



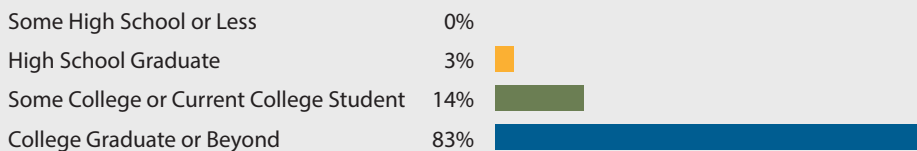
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-A, B, and C
-Definitely, Very Likely, and Probably
-Exceeded My Expectations and Met My Expectations
-Excellent, Very Good, Good, and Acceptable
-Strongly Agree and Agree
-Strongly Agree, Agree, and I am not aware of any disagreements

Q: Prior to opening your first franchise, how would you describe your business experience? (n=324)



Q: What is the last level of school you completed? (n=325)



(n=#) represents the total respondents that answered each specific question.

*Combined scores of all positive responses
-A, B, and C
-Definitely, Very Likely, and Probably
-Exceeded My Expectations and Met My Expectations
-Excellent, Very Good, Good, and Acceptable
-Strongly Agree and Agree
-Strongly Agree, Agree, and I am not aware of any disagreements

The Franchise Research Institute sent a study solicitation notification to all 503 U.S. Express Employment Professionals franchise owners. The study was completed in December 2020. Express Employment Professionals personnel gave franchisee contact information to the Franchise Research Institute for the sole purpose of sending the notification. The notification included a unique link for each franchisee to insure no responses were duplicated.

Franchise owners were encouraged by Express Employment Professionals and by the Franchise Research Institute to complete the survey, and they were assured that their individual responses would never be revealed to anyone outside the Franchise Research Institute (not even Express Employment Professionals management).

Franchisees logged on to the online survey questionnaire using their unique survey link, completed and submitted the survey. 352 of 503 U.S. franchisees, or 70%, responded and took the survey. The Franchise Research Institute has no reason to believe that non-respondents' answers would vary substantially from those who did respond.

The maximum error range on this study is $\pm 1.7\%$ at the 95% confidence level.

*Note: The Franchise Research Institute[®] does not endorse any franchise companies. Investing in a franchise is an important decision. Franchise Research Institute research services are intended to provide basic, high-level information about franchise opportunities from current franchisees, and should not replace the standard due diligence performed by any investor. The Franchise Research Institute recommends that prospective franchise buyers consult a lawyer, accountant, and/or other professionals before signing any franchise agreement.

See terms and conditions on www.FranchiseResearchInstitute.com for more information.