FRANCHISEE SURVEY OUTCOMES

August 15, 2024 – The Jim's Group



Advice from the Franchise Business Model Experts

Why FRANdata

- We are passionate about franchising.
- We uncover truth. We are fair.
- We are intensely trustworthy – and trusted.
- We have a moral code of confidentiality.
- We don't research to sell more. We research to enable meeting and exceeding business objectives.
- We understand that what we do affects lives. It is VERY personal. It is not just business.
- We do not strive to be controversial, but accept that some outcomes could be misconsAgreed.
- We celebrate our wins. We celebrate our client's wins.
- We promote our clients even more than they know – so the returns of being a FRANdata client are far and beyond calculated returns.
- We care about each other. We collaborate and leverage the best results from our collaboration.
- We do not keep information to ourselves. We want to educate our colleagues on EVERYTHING we know because two brains are better than one.
- We will not allow a client to be dissatisfied.

FRANdata is unique in its ability to assist with your objectives. We are the only research resource in the world that provides entirely objective data and analysis about franchising. We invest significant time and effort in developing and renewing a knowledge base that offers unique perspectives and insights to our clients. We apply our understanding of franchise market and industry forces to develop long-term strategic perspectives and actionable plans.

With our more than 30 year history of information and strategic integrity, FRANdata regularly receives national and international media recognition as the trusted source for understanding and measuring franchise performance.

We thank you for the opportunity to work with your organisation and look forward to a continued successful research relationship with you.



Darryn McAuliffe
CEO FRANdata Australia

August 15, 2024

Background

Established in 1989 with more than 5,000 franchisees operating across more than 50 service based divisions, the Jim's Group is the largest franchise group in Australia.

The Jim's Group engaged FRANdata to undertake an external and independent survey (across all divisions) to review the experience of franchisees.

The Survey

The survey required compulsory responses in relation to the following four statements.

1. **The reality of operating a Jim's franchise has lived up to the promise for me (Agree/Disagree).**
2. **I am positive about the future of my business (Agree/Disagree)**
3. **I would recommend this franchise to a friend (Agree/Disagree)**
4. **I would rate my income as (Good/Satisfactory/Poor).**

A link to the survey was emailed to a list of 5,454 franchisees on July 16, 2024 and was followed up by two reminders. The data collection period was closed on August 16, 2024.

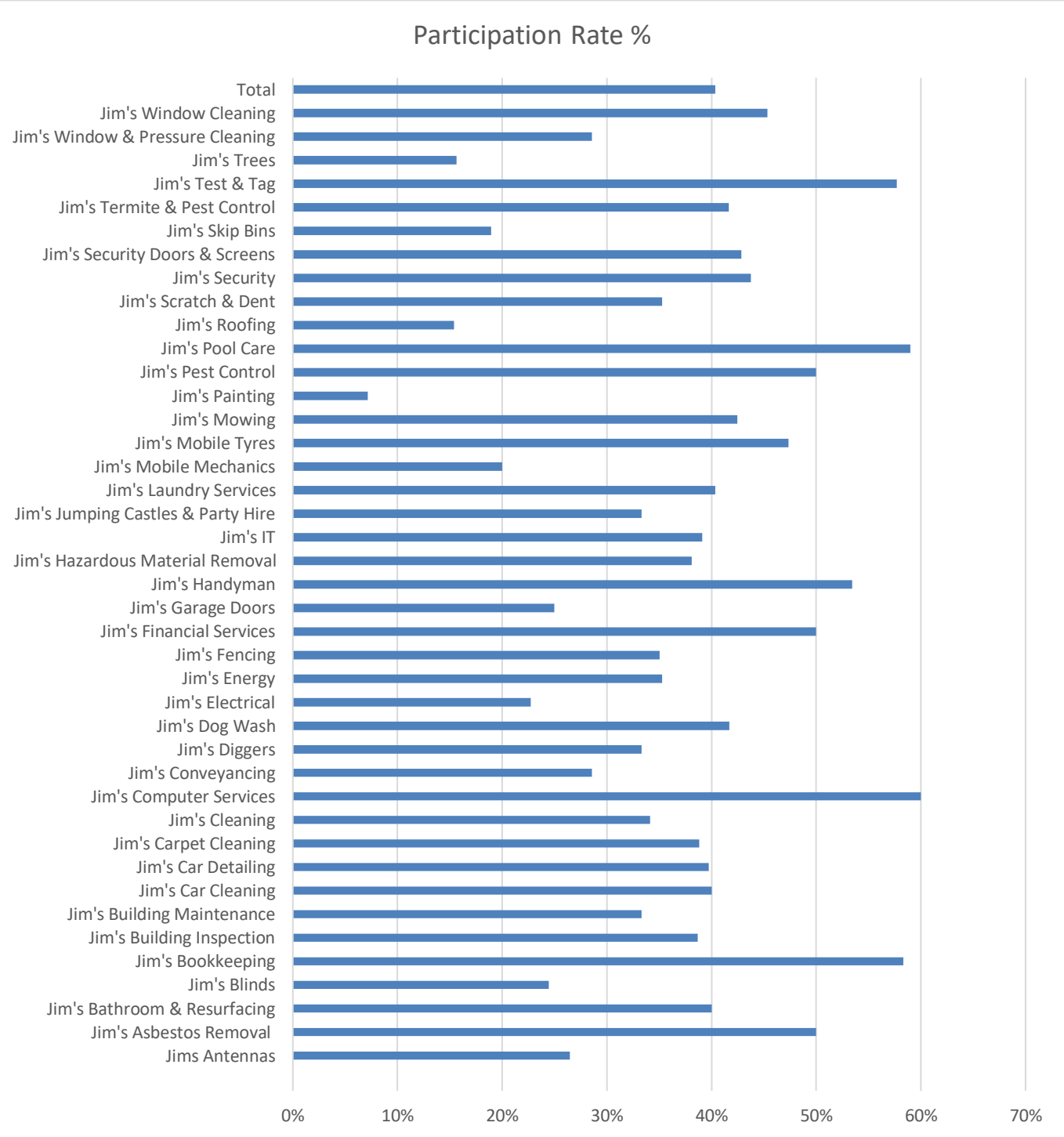
During the data collection period 2,200 responses, representing 40% of the sample, were received.

Participation Rate

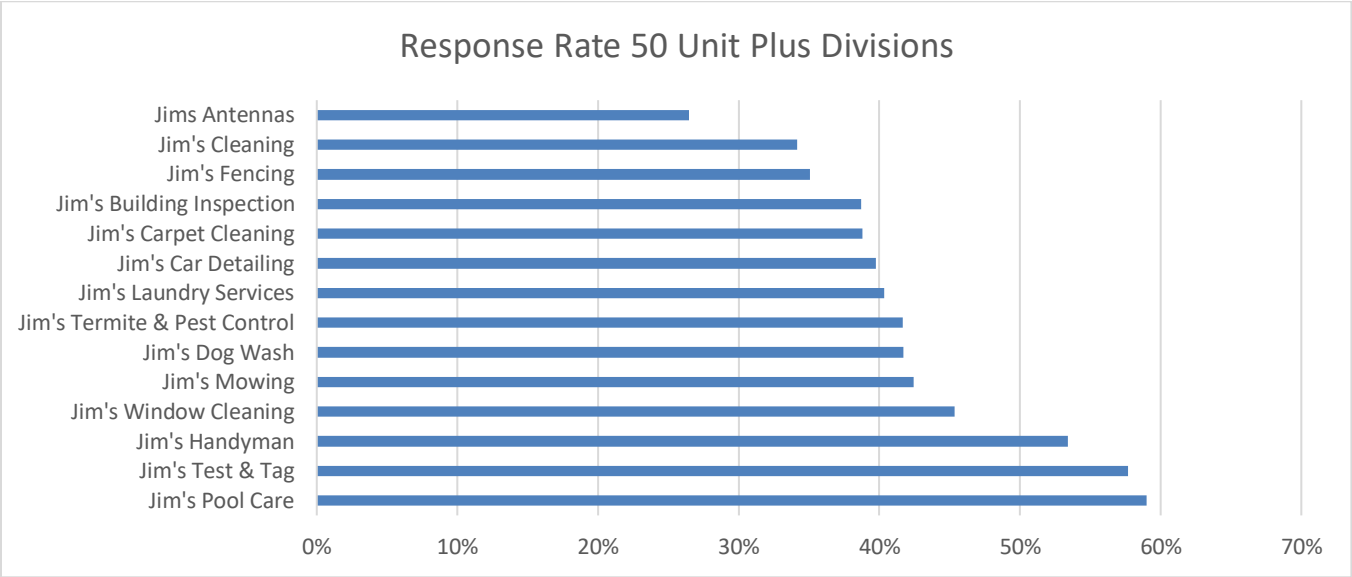
Total Participation Rate

The total participation rate was 40% (2,200 responses from a sample of 5,454).

Participation Rate by Division

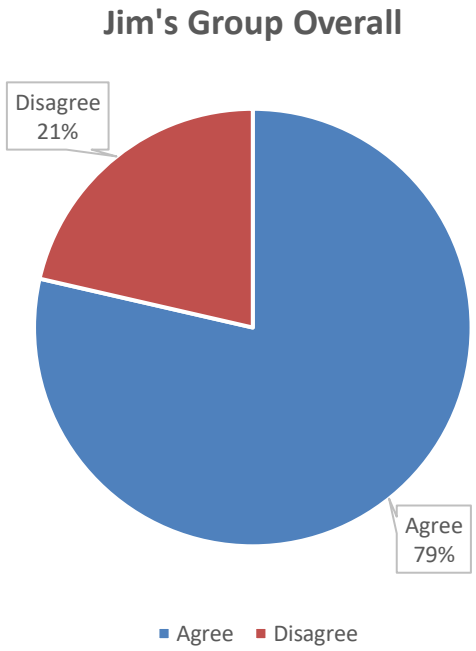


Participation Rate by Divisions with more than 50 units

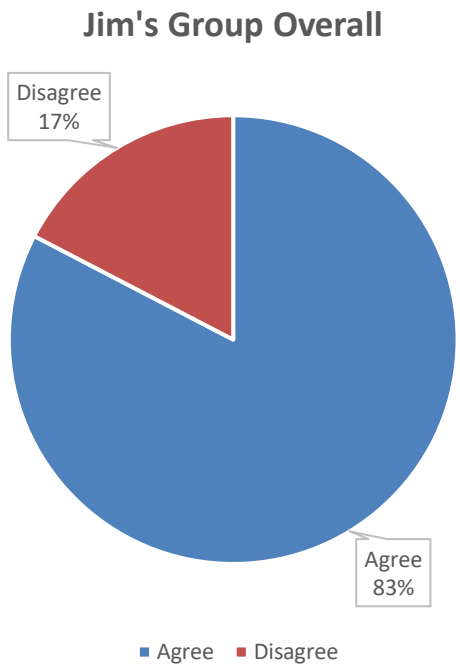


Statement Outcomes - Overall

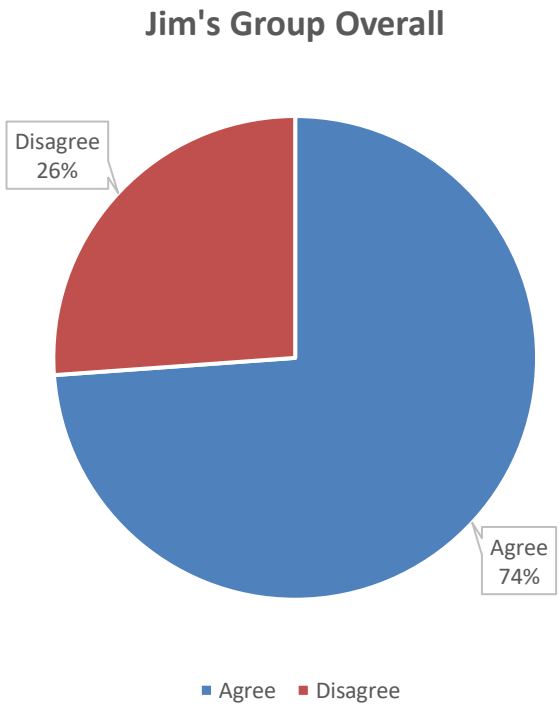
1. **The reality of operating a Jim's franchise has lived up to the promise for me (Agree / Disagree).**



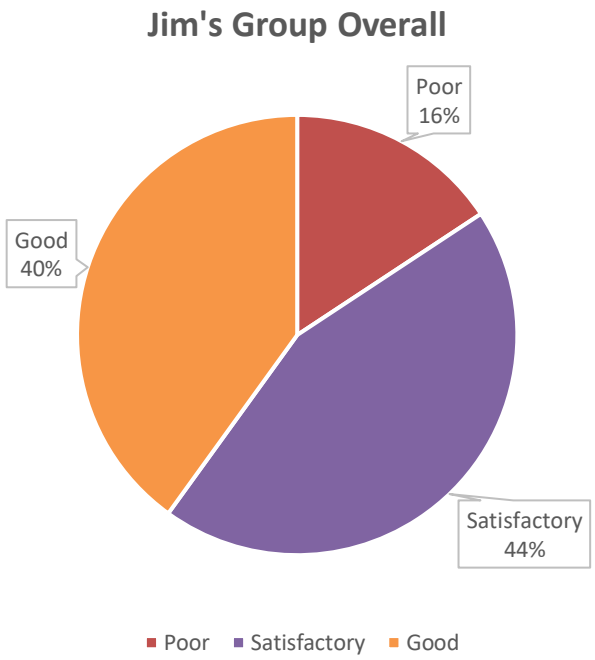
2. I am positive about the future of my business (Agree/Disagree)



3. I would recommend this franchise to a friend (Agree/Disagree)



4. I would rate my income as (Good / Satisfactory /Poor).



Statement Outcomes – By Division

1. **The reality of operating a Jim's franchise has lived up to the promise for me (Agree / Disagree).**

Division	Responses	Agree	Disagree
Jims Antennas	36	81%	19%
Jim's Asbestos Removal	1	100%	0%
Jim's Bathroom & Resurfacing	4	100%	0%
Jim's Blinds	11	73%	27%
Jim's Bookkeeping	28	75%	25%
Jim's Building Inspection	65	75%	25%
Jim's Building Maintenance	5	100%	0%
Jim's Car Cleaning	2	100%	0%
Jim's Car Detailing	89	61%	39%
Jim's Carpet Cleaning	52	81%	19%
Jim's Cleaning	349	83%	17%
Jim's Computer Services	3	33%	67%
Jim's Conveyancing	2	50%	50%
Jim's Diggers	12	50%	50%
Jim's Dog Wash	113	62%	38%
Jim's Electrical	5	80%	20%
Jim's Energy	6	17%	83%
Jim's Fencing	41	63%	37%
Jim's Financial Services	1	0%	100%
Jim's Garage Doors	2	50%	50%
Jim's Handyman	39	77%	23%
Jim's Hazardous Material Removal	8	38%	63%
Jim's IT	18	72%	28%
Jim's Jumping Castles & Party Hire	1	100%	0%
Jim's Laundry Services	46	65%	35%
Jim's Mobile Mechanics	2	0%	100%
Jim's Mobile Tyres	9	89%	11%
Jim's Mowing	904	84%	16%
Jim's Painting	2	0%	100%
Jim's Pest Control	5	100%	0%
Jim's Pool Care	82	90%	10%
Jim's Roofing	2	50%	50%
Jim's Scratch & Dent	6	100%	0%
Jim's Security	14	57%	43%
Jim's Security Doors & Screens	3	67%	33%
Jim's Skip Bins	7	86%	14%
Jim's Termite & Pest Control	35	71%	29%
Jim's Test & Tag	139	78%	22%
Jim's Trees	5	80%	20%
Jim's Window & Pressure Cleaning	2	100%	0%
Jim's Window Cleaning	44	66%	34%
Total	**2,200**	**79%**	**21%**

2. I am positive about the future of my business (Agree/Disagree)

Division		Agree	Disagree
Jims Antennas	36	69%	31%
Jim's Asbestos Removal	1	100%	0%
Jim's Bathroom & Resurfacing	4	100%	0%
Jim's Blinds	11	73%	27%
Jim's Bookkeeping	28	86%	14%
Jim's Building Inspection	65	88%	12%
Jim's Building Maintenance	5	80%	20%
Jim's Car Cleaning	2	100%	0%
Jim's Car Detailing	89	71%	29%
Jim's Carpet Cleaning	52	79%	21%
Jim's Cleaning	349	84%	16%
Jim's Computer Services	3	67%	33%
Jim's Conveyancing	2	100%	0%
Jim's Diggers	12	83%	17%
Jim's Dog Wash	113	79%	21%
Jim's Electrical	5	80%	20%
Jim's Energy	6	33%	67%
Jim's Fencing	41	73%	27%
Jim's Financial Services	1	100%	0%
Jim's Garage Doors	2	100%	0%
Jim's Handyman	39	82%	18%
Jim's Hazardous Material Removal	8	38%	63%
Jim's IT	18	83%	17%
Jim's Jumping Castles & Party Hire	1	100%	0%
Jim's Laundry Services	46	74%	26%
Jim's Mobile Mechanics	2	50%	50%
Jim's Mobile Tyres	9	89%	11%
Jim's Mowing	904	86%	14%
Jim's Painting	2	50%	50%
Jim's Pest Control	5	100%	0%
Jim's Pool Care	82	93%	7%
Jim's Roofing	2	100%	0%
Jim's Scratch & Dent	6	100%	0%
Jim's Security	14	50%	50%
Jim's Security Doors & Screens	3	67%	33%
Jim's Skip Bins	7	57%	43%
Jim's Termite & Pest Control	35	71%	29%
Jim's Test & Tag	139	88%	12%
Jim's Trees	5	80%	20%
Jim's Window & Pressure Cleaning	2	50%	50%
Jim's Window Cleaning	44	68%	32%
Total	**2,200**	**83%**	**17%**

3. I would recommend this franchise to a friend (Agree/Disagree)

Division	Responses	Agree	Disagree
Jims Antennas	36	61%	39%
Jim's Asbestos Removal	1	100%	0%
Jim's Bathroom & Resurfacing	4	100%	0%
Jim's Blinds	11	64%	36%
Jim's Bookkeeping	28	96%	4%
Jim's Building Inspection	65	71%	29%
Jim's Building Maintenance	5	60%	40%
Jim's Car Cleaning	2	100%	0%
Jim's Car Detailing	89	57%	43%
Jim's Carpet Cleaning	52	77%	23%
Jim's Cleaning	349	80%	20%
Jim's Computer Services	3	33%	67%
Jim's Conveyancing	2	50%	50%
Jim's Diggers	12	58%	42%
Jim's Dog Wash	113	61%	39%
Jim's Electrical	5	80%	20%
Jim's Energy	6	17%	83%
Jim's Fencing	41	46%	54%
Jim's Financial Services	1	0%	100%
Jim's Garage Doors	2	50%	50%
Jim's Handyman	39	67%	33%
Jim's Hazardous Material Removal	8	25%	75%
Jim's IT	18	67%	33%
Jim's Jumping Castles & Party Hire	1	100%	0%
Jim's Laundry Services	46	65%	35%
Jim's Mobile Mechanics	2	0%	100%
Jim's Mobile Tyres	9	78%	22%
Jim's Mowing	904	79%	21%
Jim's Painting	2	50%	50%
Jim's Pest Control	5	100%	0%
Jim's Pool Care	82	91%	9%
Jim's Roofing	2	50%	50%
Jim's Scratch & Dent	6	100%	0%
Jim's Security	14	43%	57%
Jim's Security Doors & Screens	3	67%	33%
Jim's Skip Bins	7	29%	71%
Jim's Termite & Pest Control	35	60%	40%
Jim's Test & Tag	139	73%	27%
Jim's Trees	5	80%	20%
Jim's Window & Pressure Cleaning	2	50%	50%
Jim's Window Cleaning	44	61%	39%
Total	**2,200**	**74%**	**26%**

4. I would rate my income as (Good / Satisfactory /Poor).

Division	Responses	Poor	Satisfactory	Good
Jims Antennas	36	19%	56%	25%
Jim's Asbestos Removal	1	0%	0%	100%
Jim's Bathroom & Resurfacing	4	0%	75%	25%
Jim's Blinds	11	27%	45%	27%
Jim's Bookkeeping	28	14%	39%	46%
Jim's Building Inspection	65	15%	46%	38%
Jim's Building Maintenance	5	0%	60%	40%
Jim's Car Cleaning	2	0%	0%	100%
Jim's Car Detailing	89	33%	44%	24%
Jim's Carpet Cleaning	52	17%	54%	29%
Jim's Cleaning	349	15%	45%	40%
Jim's Computer Services	3	33%	33%	33%
Jim's Conveyancing	2	0%	100%	0%
Jim's Diggers	12	33%	42%	25%
Jim's Dog Wash	113	14%	50%	35%
Jim's Electrical	5	20%	40%	40%
Jim's Energy	6	83%	17%	0%
Jim's Fencing	41	15%	56%	29%
Jim's Financial Services	1	0%	100%	0%
Jim's Garage Doors	2	100%	0%	0%
Jim's Handyman	39	26%	54%	21%
Jim's Hazardous Material Removal	8	50%	38%	13%
Jim's IT	18	33%	56%	11%
Jim's Jumping Castles & Party Hire	1	0%	100%	0%
Jim's Laundry Services	46	39%	35%	26%
Jim's Mobile Mechanics	2	100%	0%	0%
Jim's Mobile Tyres	9	11%	33%	56%
Jim's Mowing	904	10%	45%	45%
Jim's Painting	2	100%	0%	0%
Jim's Pest Control	5	0%	40%	60%
Jim's Pool Care	82	7%	34%	59%
Jim's Roofing	2	50%	0%	50%
Jim's Scratch & Dent	6	0%	50%	50%
Jim's Security	14	29%	50%	21%
Jim's Security Doors & Screens	3	67%	33%	0%
Jim's Skip Bins	7	14%	43%	43%
Jim's Termite & Pest Control	35	34%	34%	31%
Jim's Test & Tag	139	15%	35%	50%
Jim's Trees	5	20%	20%	60%
Jim's Window & Pressure Cleaning	2	50%	50%	0%
Jim's Window Cleaning	44	23%	48%	30%
Total	**2,200**	**16%**	**44%**	**40%**



Founded in the United States of America in 1989*, FRANdata is the franchise industry's number one source for objective information and analysis. FRANdata receives no advertising or other fee arrangements that might influence its objectivity. Using its library of Franchise Documents, along with both primary and public sources, FRANdata supports the research and competitive intelligence functions of franchisors, helps franchisees evaluate different concepts, provides information and analysis for legal and financial organisations, and provides marketing access to franchisors and franchisees. FRANdata is used exclusively to provide services for the U.S. SBA Franchise Registry (www.franchiseregistry.com).

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02 8346 6093
www.FRANdata.com.au