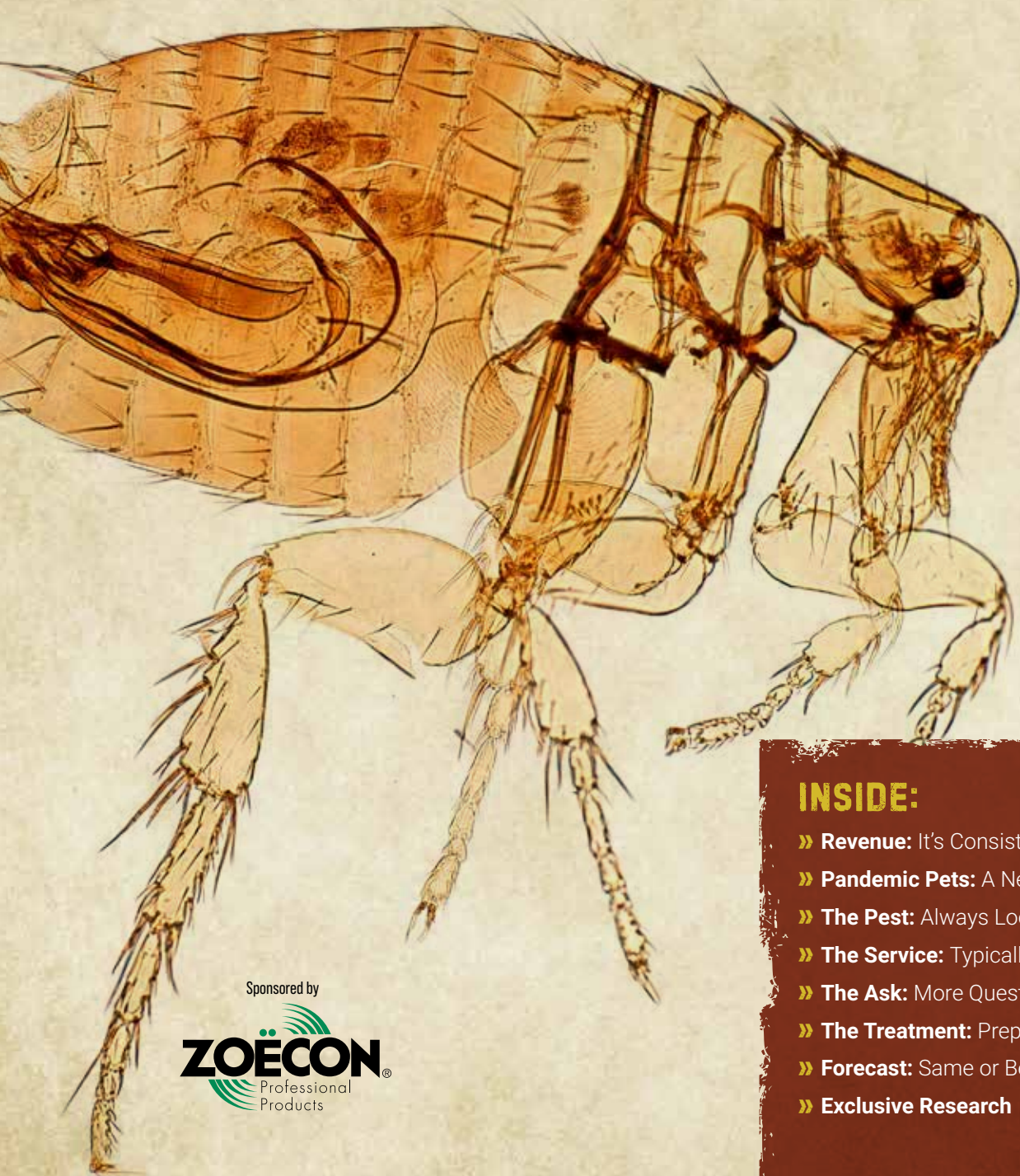


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2021 State of the FLEA CONTROL MARKET REPORT



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INSIDE:

- » **Revenue:** It's Consistent
- » **Pandemic Pets:** A New Opportunity
- » **The Pest:** Always Looking for an In
- » **The Service:** Typically, an Upsell
- » **The Ask:** More Questions are Better
- » **The Treatment:** Prep Matters
- » **Forecast:** Same or Better (!) in 2021
- » **Exclusive Research**

REVENUE: IT'S CONSISTENT

Flea control is not the money maker it was decades ago, but it remains a consistent source of revenue for pest management companies.

“There isn’t a week that goes by that we don’t do flea services,” said Kerry Lindsey, general manager of Terminix Service Company’s Northshore branch in Slidell, La.

On average, flea control generated 4.5 percent of total company revenue or about \$20,900 per company last year, according to the PCT 2021 State of the Flea Control Market survey, which was sponsored by Zoëcon/Central Life Sciences and conducted by Readex, an independent research company.

Because the service accounts for a small share of revenue, pest management professionals had mixed feelings about its importance to the business. Most (42 percent) were ambivalent — finding flea control neither important nor unimportant — but in follow-up interviews they said it is key to developing long-term customers.

Not offering flea control means potential (and possibly existing) customers will go elsewhere for it. “If you don’t offer it

they’ll find somebody else and then the next time they have ants or bees or mice, who are they going to call? They’re going to call the company that took care of the fleas,” said Tony DeJesus, vice president of Big Blue Bug Solutions, which is based in Providence, R.I. and serves six states in New England.

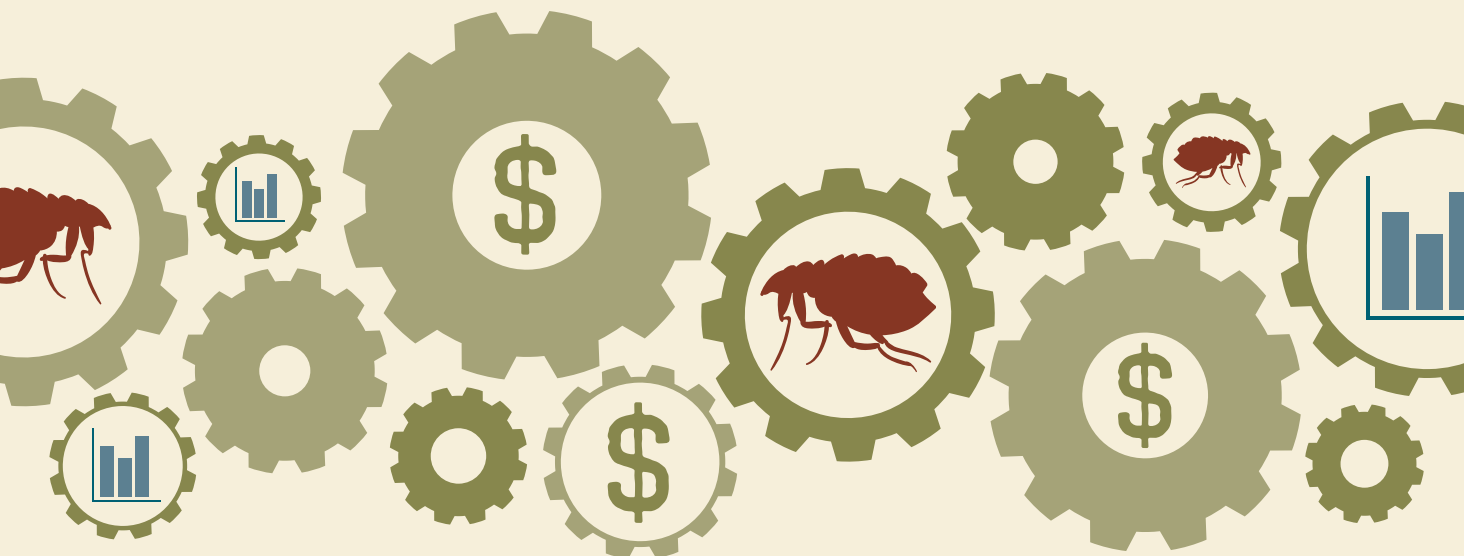
For Dan Ledbetter, owner of Eagle Pest Control “The Ant King of Brevard” in Rockledge, Fla., the reason for offering flea control is quite simple: “I’m a professional pest control operator.” Fleas cause problems for customers; controlling them is a part of the job, he explained.

Over the past three years, the percentage of revenue generated from flea control services at companies stayed the same, reported 57 percent of PMPs.

Thirty-four percent of PMPs said the market share lost to on-pet flea control products has begun to return to the professional pest management industry; 30 percent said it has not; and 36 percent did not believe the industry lost share to such products. 🐜

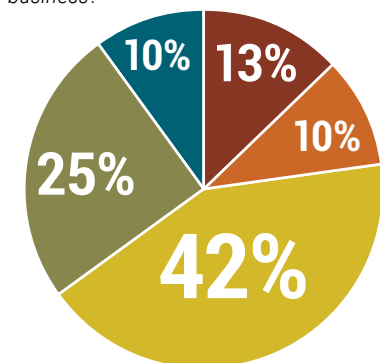
» **4.5%** average percentage of service revenue generated from flea control services

Source: Readex Research; Number of respondents: 279



Mixed Bag

How important is the residential flea control market to your location's business?

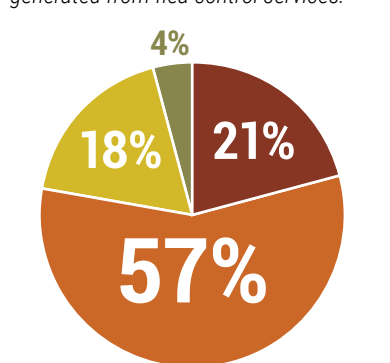


- very important
- important
- neither important nor unimportant
- less important
- not at all important

Source: Readex Research; Number of respondents: 279

Slow & Steady

In the past three years, has the percentage of your location's revenue generated from flea control services:

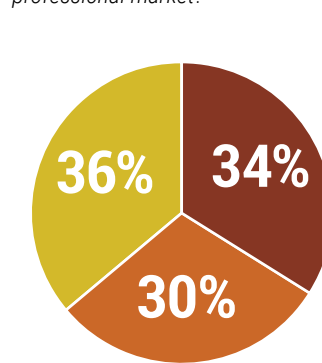


- increased
- remained the same
- decreased
- cannot compare; my location did not offer flea control services three years ago

Source: Readex Research; Number of respondents: 279

Market Back to PMPs?

Has the marketshare lost to on-animal products begun to return to the professional market?



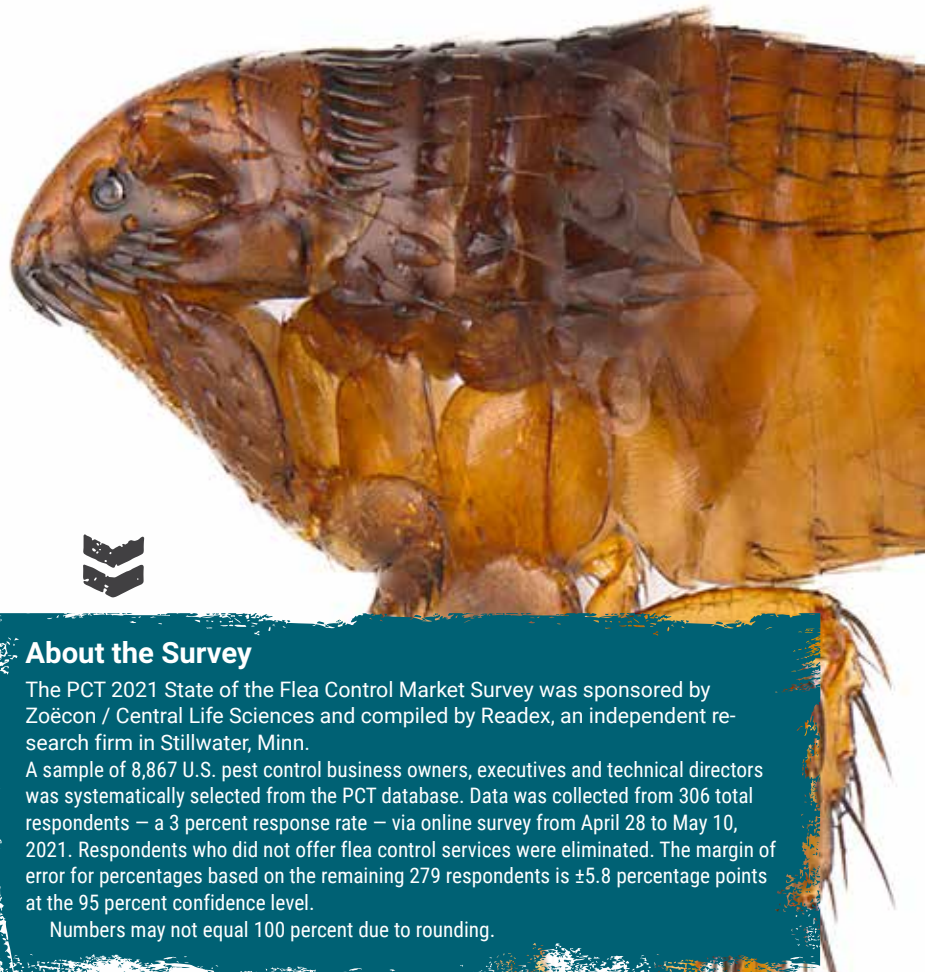
- yes
- no
- don't believe the industry lost market share to on-animal products

Source: Readex Research; Number of respondents: 279

\$20,900

average amount of revenue generated from flea control services in 2020

Source: Readex Research; Number of respondents: 279



About the Survey

The PCT 2021 State of the Flea Control Market Survey was sponsored by Zoëcon / Central Life Sciences and compiled by Readex, an independent research firm in Stillwater, Minn.

A sample of 8,867 U.S. pest control business owners, executives and technical directors was systematically selected from the PCT database. Data was collected from 306 total respondents – a 3 percent response rate – via online survey from April 28 to May 10, 2021. Respondents who did not offer flea control services were eliminated. The margin of error for percentages based on the remaining 279 respondents is ±5.8 percentage points at the 95 percent confidence level.

Numbers may not equal 100 percent due to rounding.

THE PEST: ALWAYS LOOKING FOR AN 'IN'



What causes flea infestations? “Usually, it boils down to pet owners not doing preventive treatments on their pets,” said Glenn Fordham, owner operator of Olympic Pest & Termite Control in Talmo, Ga.

On occasion rodents, wildlife and feral cats cause issues. Fordham had fleas that kept appearing on a client’s ceiling. “It was several trips out there before I figured out they were coming out the ceiling and not from the floor,” he recalled. The fleas were crawling out of a light fixture opening and had arrived on a raccoon nesting between the roof and ceiling. Removing the raccoon and treating with dust eventually fixed the problem, said Fordham.

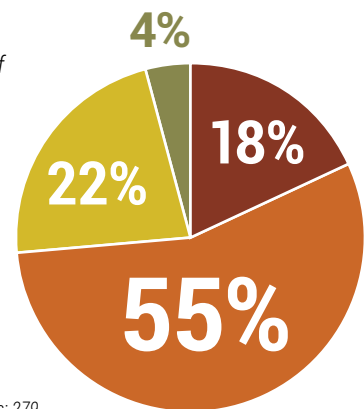
In Southern Louisiana, fleas can be more pervasive in some areas than others, said Kerry Lindsey, Terminix Service Company. Even customers without pets can get infested; they pick them up outdoors and bring them inside just by walking to their mailbox.

But overall, the incidence of flea infestations remained the same over the past year, reported 55 percent of PMPs in the PCT 2021 State of the Flea Control Market survey. The most common flea species encountered by PMPs were cat fleas (84 percent) and dog fleas (66 percent). 🐾

A Constant Service

Over the past year, has the incidence of flea infestations in your market area:

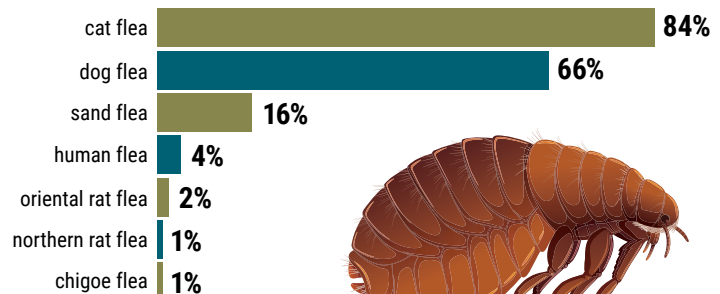
- increased
- remained the same
- decreased
- cannot compare; my location did not offer flea control services a year ago



Source: Readex Research; Number of respondents: 279

Same Old Suspects

What flea species are common in your market area?



Source: Readex Research; Number of respondents: 279; Respondents could select multiple answers

THE SERVICE: TYPICALLY, AN UPSELL

Flea work varies in the severity of the infestation and the overall complexity of the job. As such, most PMPs (79 percent) offer flea control as a separate, add-on service, found the PCT 2021 State of the Flea Control Market survey.

Lance Griggs, owner of Spectrum Pest Management in Madison, Ala., prefers to treat the entire house, especially when clients have indoor-outdoor pets with full run of the home.

“You can get good money for a flea job. It’s several hundred dollars usually to treat the house and if you do the yard it’s more on top of that,” said Griggs, whose program involves three treatments.

Customers will go with the treatment plan their pest professional suggests, said Kerry Lindsey, Terminix Service Company. “Fleas are pretty traumatic. It’s like bed bugs. When you have something parasitic like that just feeding on you, those people are zero tolerant,” he said.

In 2020, the average price charged for a typical residential flea control service was \$210, found the PCT survey. Most companies (76 percent) guarantees their service.

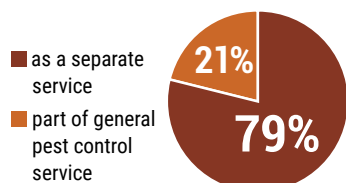
Weather influences when flea season starts and ends. In metro Atlanta, “mid to late summer is usually where we have the most calls. Moisture has a lot to do with it and temperature,” said Glenn Fordham, Olympic Pest & Termite Control.

The season for Griggs in northern Alabama picks up in late summer and can run through November, while flea work in southern Louisiana is nearly year-round for Terminix Service Company.

Nearly a third (30 percent) of pest control companies do not specifically promote their flea control service. Those that do emphasize features like the service guarantee (40 percent), excellent control (37 percent), certified technicians (34 percent), free inspection (27 percent) and benefits of preventive treatment (20 percent).

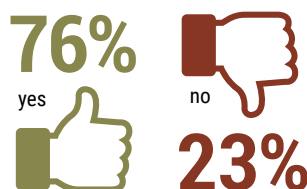
How You Sell

How does your location offer flea control services?



Satisfaction Guaranteed

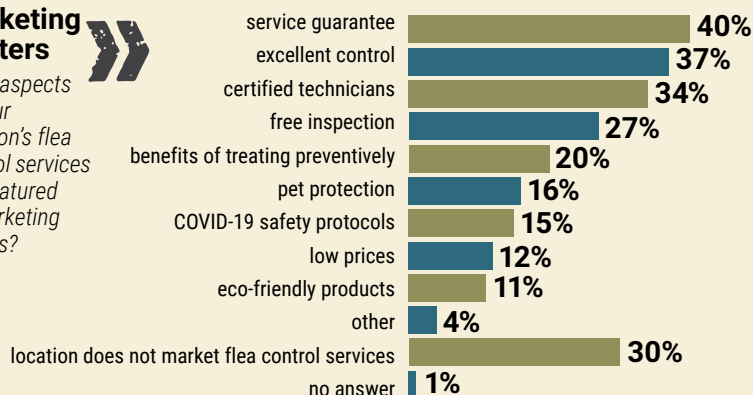
Does your location provide any sort of guarantee for its flea control services?



Source: Readex Research; Number of respondents: 279

Marketing Matters

What aspects of your location's flea control services are featured in marketing efforts?



Source: Readex Research; Number of respondents: 279; Respondents could select multiple answers



\$210
average price charged for a typical residential flea control service job

Source: Readex Research; Number of respondents: 278

SOLUTIONS FOR EXTENDED RESIDUAL FLEA CONTROL

The Precor® product line from Zoëcon offers solutions to rid homes of the fleas you can see and those you can't.



The outcome of any treatment can be dependent upon the pre-treatment work homeowners do before and after flea products are applied. For the most effective and efficient flea treatment, remind homeowners to follow these helpful steps both before and after product application for lasting results:



PRE-TREATMENT TIPS

1. Vacuum all rugs, carpets and furniture— especially between and under cushions. Then, tightly seal and dispose of the vacuum bag outside.
2. Clear and clean all floors, even closets. Mop all tile and vinyl floors. Sweep all concrete floors.
3. Remove all decorative items such as pillows and blankets. Be sure to check for items under beds and furniture.
4. Remove all pets and pet accessories, including pet food and water dishes. Fish bowls and aquariums may remain if properly covered and the air pump is shut off during treatment.
5. Wash or dispose of all pet bedding. If laundering, wash pet bedding separately from other linens.



POST-TREATMENT TIPS

1. Wait for the specific instructions from your control professional to find out when it is safe to return home.
2. Wait to resume normal vacuuming 24 hours after a home has been treated to give the insecticide time to work.
3. Continue vacuuming for 2-3 weeks at intervals of 3-4 days. The vacuum's mechanical pressure will improve the effectiveness of the insecticide by stimulating fleas to emerge from their protective pupae cases.
4. Expect to see some adult fleas for up to 3 weeks after treatment. Flea pupae are protected from insecticides by their cocoons. Fleas will continue to emerge for 1-3 weeks if proper stimulation (vacuuming/daily activity) is not carried out in infested areas. Once exposed to the insecticide residual, they will be eliminated.

Development from egg to adult can range from 16 days to a year

Females lay 400-800 eggs over course of life



Mature larvae cocoon and pupate

Larvae feed primarily on "flea dirt", adult flea feces that accumulates in areas infested animals frequent.

HABITATS

Larvae are found in areas where host animals frequent such as pet bedding, carpets, floor areas, seams of furniture and other areas where flea droppings and organic matter accumulate. Adults are found on host animals such as pets or other warm blooded animals associated with homes and buildings.

BEHAVIOR

- Host blood is primary shelter and source of blood for nutrition and reproduction
- Adult fleas remain on hosts unless physically dislodged
- Adult female fleas lay eggs on the host that readily fall off into the environment where the larvae develop
- Spread by contact with infested environment or other animals



Learn how to make fleas disappear with just one treatment with our Flea Treatment Brochure at Zoecon.com.

KNOW THE ENEMY

Fleas have narrow bodies which allow them to glide through pet fur easily. Laterally, they are almost flat, allowing them to stealthily maneuver. Their back legs are spring-loaded, allowing them to jump up to six inches in the air. They have piercing-sucking mouthparts, allowing them to dig into their host and suck blood to sustain themselves.



SIZE Less than ¼"

COLOR Brown

FEATURES Narrow, comb of spines across body including near the head, hairs across body, wingless

YOUR GUIDE TO FLEA FREE LIVING

Even as we begin to see COVID-19 restrictions lifted across the country and see customers return to a bit more normalcy this summer, pest management professionals remain essential when it comes to protecting their customers' homes from pests like fleas. With a large uptick in pet adoptions over the past year due to the pandemic along with a sizable majority of employees shifting towards remote-work style for the foreseeable future, PMPs will need to continue in providing their crucial services.

To properly address this new way of life that includes everything from remote teaching to home offices and more pets, PMPs should consider treating homes with products that feature the active ingredient (S)-methoprene. This insect growth regulator (IGR) penetrates and migrates deep into places like the base of carpet fibers and between furniture cushions to prevent pre-adult fleas from maturing into breeding, biting adults. IGRs also feature up to seven months of control against future flea infestations, allowing PMPs to reduce callbacks and avoid multiple home visits.

5.2%

Typical callback rate for
flea control services

Source: Readex Research;
Number of respondents: 279



THE ASK: MORE QUESTIONS ARE BETTER

Successful flea control involves multiple steps. The first: preparing the site for treatment, which involves setting customer expectations, gaining their cooperation and learning as much as you can about the flea situation at hand.

“If somebody calls me and they have fleas, it starts with questions,” said Dan Ledbetter, Eagle Pest Control “The Ant King of Brevard.”

These include: Does the customer have dogs or cats? Are they indoor or outdoor pets? Where do pets spend most of their time in the house and yard? Do they lay on furniture or sleep on the bed? Where do they jump down from furniture? Where do they eat? Do they visit dog parks or doggie daycare? Are animals treated with an on-pet flea treatment?

Cats pose additional challenges. “They climb, they sit in places where a dog just doesn’t normally go,” said Tony DeJesus, Big Blue Bug Solutions. This may include window ledges, the top of the refrigerator or a shelf in the closet. “Ultimately

it can be more difficult to treat a house with cats than it can be with dogs,” he said.

Flea eggs, larvae and pupae are found where infested animals spend time. But in addition to identifying these “hot spots,” it’s essential to set proper expectations for treatment.

“There is no magic wand,” reminded Kerry Lindsey, Terminix Service Company. While customers will see an immediate decline in the flea population after treatment, early adult fleas may continue to emerge from existing pupae for a few weeks; these fleas then will come in contact with the residual treatment and die.

Flea control is not easy, reminded Lance Griggs, Spectrum Pest Management. “You have to be very diligent in how you do it, and how the customer reacts and how you get the customer involved, or it’s not going to work,” he said.

The average callback rate for flea control service was 5.2 percent, found the PCT 2021 State of the Flea Control Market survey. 🐾

THE TREATMENT: PREP MATTERS

Successful flea treatments require proper site preparation. Josh Rzepka, president of Enviro-Pest Solutions in Waterloo, Iowa, gives customers a prep sheet, similar to when he does bed bug jobs. “These are the things that need to be met for us to do the treatment properly. Sometimes we will help them prep,” especially if they’re elderly, he said. Homeowners must sign off on Rzepka’s prep requirements to ensure they understand their role in the process.

Without customer cooperation, getting control is much more difficult. “If they haven’t done anything, you’re pretty much assured it isn’t going to be an easy job,” said Glenn Fordham, Olympic Pest & Termite Control.

For 65 percent of PMPs who participated in the PCT 2021 State of the Flea Control Market survey, prep involves vacuuming. Kerry Lindsey, Terminix Service Company, tells customers to vacuum using the beater brush. This creates vibrations that mimic those of a walking mammal, triggering early adult fleas to emerge from pupae.

In addition to carpeting, he advises clients to vacuum hardwood, tile, laminate and vinyl floors. Flea eggs, larvae, pupae, feces and pet dander can collect in the cracks and crevices between joints and under baseboards. “It’s an ideal spot for them,” said Lindsey, who also recommends vacuuming under appliances in laundry rooms.

Additional prep requirements include picking items up off the floor, washing bed linens (if pets sleep on beds), washing or disposing of pet bedding and toys, cutting the lawn if outdoor treatment is needed, and treating animals with a veterinarian-approved flea treatment.

“On-pet treatments are crucial,” said Lance Griggs, Spectrum Pest Management.

Dan Ledbetter, Eagle Pest Control “The Ant King of Brevard,” agreed. “You’re just going to keep going back if you’re not treating the animal,” he said. According to the PCT survey, 84 percent of PMPs recommend clients get pets treated by the vet or use an over-the-counter flea treatment prior to flea control service.

Most PMPs (89 percent) use an insect growth regulator (IGR) as part of their flea control protocol, and 81 percent use a combination of IGR and general insecticide as their *primary* treatment regimen.

“Any company doing flea control and not using an insect growth regulator is chasing their own tail. You’ve got to have the insect growth regulator with the adulticide, without a doubt,” said Lindsey.

In addition to treating indoors, nearly three quarters (74 percent) of PMPs perform outdoor treatments. Griggs likes to use insecticide granules outdoors. “Granules are slow but good, especially if we’re getting some rain or if people overdo it with their sprinkler systems,” he said.

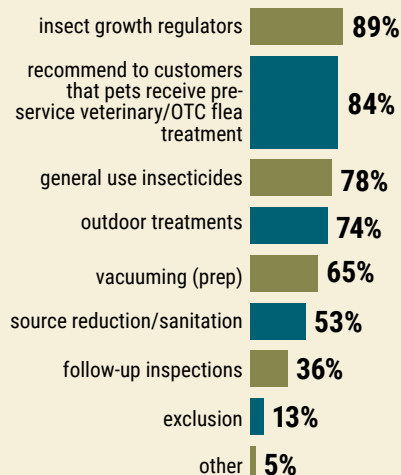
The average time spent performing a typical residential flea control job was 1.1 hours, found the PCT survey.

Post-treatment instructions are provided to customers by 58 percent of PMPs. Ongoing vacuuming and pet treatment top the list of must-do activities, they reported in follow-up interviews. 🐾



IGRs Lead the Way

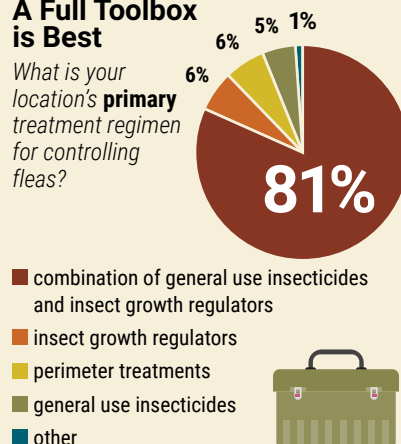
What service protocols are included in your location's flea control programs?



Source: Readex Research; Number of respondents: 279; Respondents could select multiple answers

A Full Toolbox is Best

What is your location's **primary** treatment regimen for controlling fleas?



Source: Readex Research; Number of respondents: 279



PANDEMIC PETS: A NEW OPPORTUNITY

According to the PCT 2021 State of the Flea Control Market survey, 29 percent of PMPs said they witnessed an increase in pet ownership among customers due to the COVID-19 pandemic.

“There is a lot of adoption and rescue going on,” said Kerry Lindsey, Terminix Service Company.

Tony DeJesus of Big Blue Bug Solutions volunteers at the local animal shelter and saw this firsthand. “People were looking for companions. They’re stuck in the house, and you need somebody to talk to,” he said.

Twenty-nine percent of PMPs agreed customers appeared more emotionally attached to their pets because of the COVID-19 pandemic; 51 percent agreed spending more time at home during the pandemic helped pet owners identify flea problems sooner.

DeJesus saw a slight uptick in flea work last year. “I think a lot of it may have been pandemic driven, that people were home and noticed things a little bit more and they bought dogs and cats that maybe they wouldn’t have bought” otherwise, he said.

The pandemic-pet phenomenon reinforced the importance of providing flea control service, agreed 39 percent of PMPs. More than one-third (34 percent) said the pandemic was an opportunity for the industry to reinforce its protectors-of-public-health messaging. 🐾

Percentage of PMPs who agreed...

51%	Pet owners are identifying flea problems sooner than in the past because they’re spending more time at home.
39%	With people spending more time with their pets in the age of COVID-19, providing flea control services is more important than ever for the industry.
34%	The COVID-19 pandemic is an opportunity for PMPs to reinforce the message that they are protectors of public health.
29%	Our company has witnessed a rise in pet ownership among our customers as a result of the COVID-19 pandemic.
29%	Our customers appear to have become even more emotionally attached to their pets because of the COVID-19 pandemic.
17%	Do not agree with any of these statements

Source: Readex Research; Number of respondents: 279; multiple answers

FORECAST: SAME OR BETTER (!) IN 2021



For the most part, PMPs expect a repeat of last year's flea control season.

According to the PCT 2021 State of the Flea Control Market survey, 58 percent predicted revenue from the service would remain the same as in 2020, while more than a third (34 percent) anticipated an increase in flea revenue.

Wetter, warmer weather in some regions will help. "We didn't have much of a winter. I suspect that it's going to be a good flea season for us," said Kerry Lindsey, Terminix Service Company.

The loosening of pandemic-related travel restrictions may have more people visiting with their pets and bringing home fleas, added Dan Ledbetter, owner of Eagle Pest Control "The Ant King of Brevard."

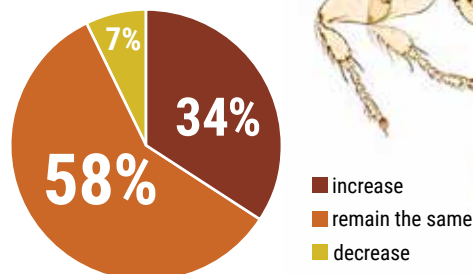
The continued shift to remote work will have an impact, as well. "You'll see an increase in work just because people are noticing things a lot more because they are home so much," said Glenn Fordham, Olympic Pest & Termite Control.

Bright 2021

Compared with 2020, how do you anticipate the percentage of your location's flea control service revenue to change in 2021?

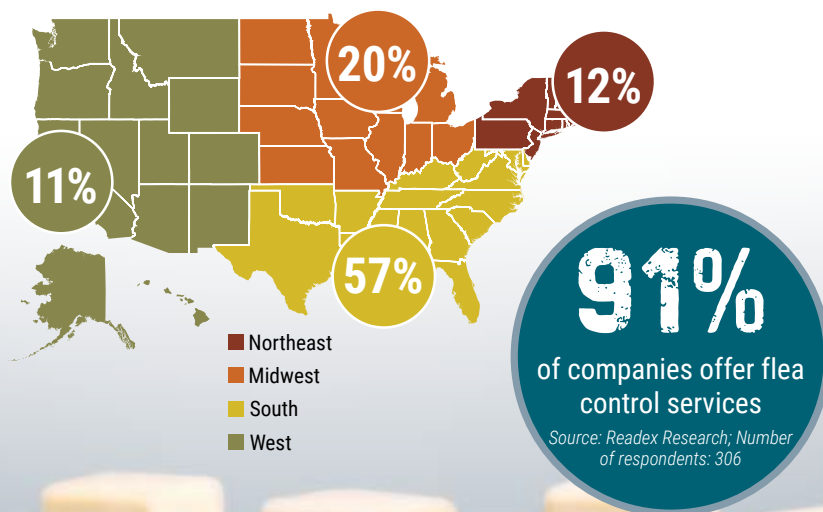


Source: Readex Research; Number of respondents: 279



Who Participated in the Survey

Most PMPs (91 percent) who participated in the PCT 2021 State of the Flea Control Market survey said their companies provided flea control services. More than half of survey respondents (57 percent) were located in the Southeastern U.S.



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