

2021 STATE OF THE TICK CONTROL MARKET



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MARKET ON THE UPTICK



96%

OF PMPs EXPECT TICK
REVENUES TO MEET OR
EXCEED 2020 RECEIPTS

Tick season started early this year, at least in markets where winters were warmer and wetter than usual. Ticks thrive in humidity, and if the 2021 Farmer's Almanac has it right — that this summer will be “warm and stormy” for much of the country — then these annoying and potentially dangerous pests will be out in full force.

In North Florida, Todd Barber says that Barber's Best Termite and Pest started getting calls as early as February. “We've seen year-over-year increases in tick calls for several years now, with a particularly dramatic spike in the past two,” he says. “A lot of that has to do with the weather. We've had consistently warm weather year-round, without enough sustained cold to have an impact on tick populations. This year's mild winter and heavy

rains have helped populations explode.”

Fourteen hundred miles north, in Brunswick, Maine, Mike Peaslee reports an early tick season as well. Spring boasted temperatures nearly 20 degrees higher than normal, he says, and tick calls to Modern Pest Services started as early as March. “We can usually count on steady tick business from May through September, with maybe a few calls in April, but we're about a month ahead of schedule this year,” he shares. “In New England, Lyme disease is a major concern. Customers are very aware, very conscious of the health risks associated with ticks, so when they see any activity at all, they call us.”

Brian Nauert of Bugs By Brian, who has teams treating ticks in Missouri and Florida, is looking for a “bump” this year,

too, not only because of the warm, wet winter in Florida but also the abundance of snow and rain in Missouri. “Although we haven't reached the flood stage yet, the rivers, tributaries and creeks are swelling, and we have another 30 or 40 days left in the rainy season,” he said in April. “If it gets warm enough after the rain to melt the snow in the Rockies, that can cause our rivers to flood. That chases the small land animals to higher ground in concentrations that are attractive to ticks. They go crazy because of the readily available food.”

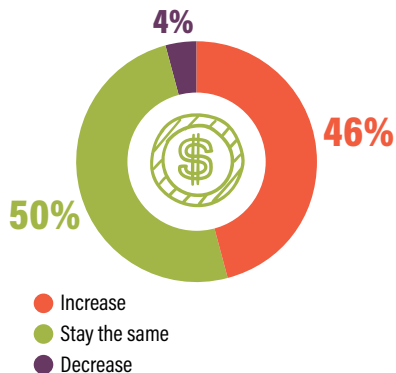
In fact, PMPs across the nation have prepared themselves for high tick pressure this summer. The hot weather plus growing consumer awareness and concern of tick-borne diseases create a strong business opportunity. This likely explains why the number of pest control companies offering tick control services edged up a bit this year, from 76 percent in 2020 to 79 percent in 2021, according to the 2021 PCT State of the Market Tick Control survey.

What's more, nearly all of the PMPs who offer tick services — 96 percent — look for steady or growing business in 2021. Among them is Bob Masters of Masters Termite and Pest Control, which serves customers in New York, New Jersey and Pennsylvania. “We always see high tick pressure in season, and this year, because people are spending more time at home, in their own backyards, we expect them to be more likely to come into contact with ticks and call us. When you're outside playing with your kids, the last thing you want to see is a tick.” 🦋



Tick Control Revenue This Year

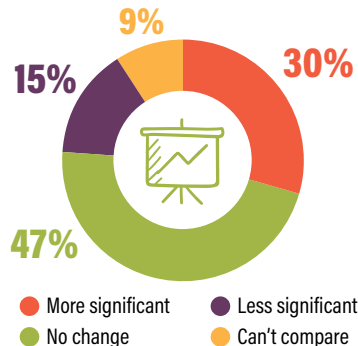
How do you expect the percentage of your tick service revenue to change in the next year?



Source: Readex Research; Respondents: 129

Five-Year Trend

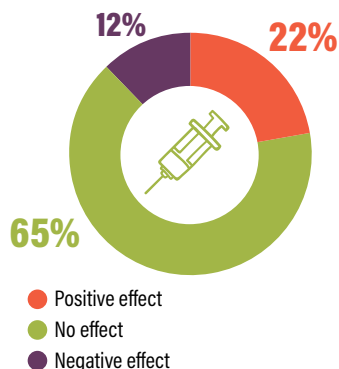
In the past five years, has tick control become a more or less significant portion of your business?



Source: Readex Research; Respondents: 129

Impact of Pandemic on Business

How did the COVID-19 pandemic affect your tick control business?



Source: Readex Research; Respondents: 129



WHICH TICKS DO PMPs ENCOUNTER?

Two-thirds (67 percent) of survey respondents said they encounter brown and American dog ticks in their markets, while nearly half (47 percent) reported seeing Eastern black-legged, or deer, ticks. For many, brown dog and deer ticks seem to be on the rise: 28 percent of respondents to last year's survey said brown dog ticks represented the largest percentage of their service calls in 2019, while 35 percent reported they were the most prevalent species in their markets in 2020. Similarly, 18 percent reported the most calls for deer ticks in 2019, while 29 percent named them the most prevalent species in their markets in 2020.

TICK TYPES

What species have you encountered in your area? Which is most prevalent?

	SEE THEM	MOST PREVALENT
Brown dog tick	67%	35%
American dog tick	67%	22%
Eastern blacklegged tick (deer tick)	47%	29%
Lone star tick	22%	3%
Rocky Mountain wood tick	5%	2%
Gulf Coast tick	3%	1%
Pigeon tick	3%	0%
Western blacklegged tick	2%	0%
Relapsing fever tick	2%	1%
Other species	5%	5%
No answer	1%	4%

Source: Readex Research; Respondents: 129



TACKLING TICK TROUBLES: TREAT 'EM RIGHT!

When it comes to tick management, the vast majority of pest management professionals (95 percent) say they use residual pesticides in various formulations. Four out of five say a residual pesticide is their *primary* control measure, and 40 percent add an insect growth regulator (IGR) to stop larvae and nymphs from developing into adults.

Jason Julio of Last Bite Mosquito & Tick Control in Red Bank, N.J., says his team adds a granular application to their standard misting treatment for one in five or six customers. “The liquid product we use controls ticks as well as mosquitoes, but in cases where customers have a particular concern about ticks, or where ticks are an ongoing issue, we also apply a granular pesticide to form a barrier around the house and at the property line,” he explains.

Brian Nauert of Bugs By Brian uses a granular pesticide for perimeter treatments, too, in conjunction with a liquid around mulch beds and dense shrubbery. “We also spray about 10 feet into the woods line, concentrating on tree trunks and underneath the trees, about waist-high or so — maybe 4 feet up and 10 feet in,” he says.

Of course the layout and condition of a property play into

the treatment protocol.

“Properties can be challenging when they have a lot of shaded areas with dense vegetation close to the ground,” says Mike Peaslee of Modern Pest Services. “Technicians need to look for these conducive areas, as well as brush piles and structures that provide shelter, and be especially thorough with applications there.”

TREAT THE RODENTS, MANAGE THE TICKS. Although only 4 percent of survey respondents use rodent control as their primary control measure for ticks, more than a quarter (26 percent) do incorporate rodent control into their service. Makes sense: Rodents are a popular host for ticks, so keeping them out of customers’ yards can go a long way in managing infestations.

“When we walk a property during our inspection, we look for signs of rodent activity: burrows, droppings, grease marks — anything that might indicate the presence of rodents,” says Todd Barber of Barber’s Best Termite and Pest. “If we determine that rodents are an issue, we explain to the homeowner why it’s critical to eliminate them to successfully eradicate the ticks.” 🐭

HOW OFTEN SHOULD YOU TREAT?

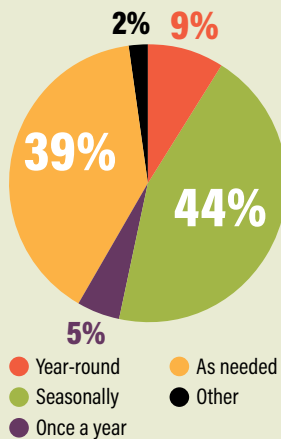
Frequency of tick treatments depends on several factors: whether the property is located near a wooded area, whether the customer has pets or wild animals roaming in and about their property, recent weather conditions in the area, and the customer's level of concern. PMPs tend to set standard timelines and then adjust to each account's needs.

In the St. Louis market, Josh Carver of Pro Turf & Pro Pest Solutions applies a broad-band insecticide as a preventive measure before the heaviest part of tick season sets in. For customers who experience tick activity, he recommends monthly liquid applications. "We start getting a ton of phone calls in mid-May to early June," Carver says. "Depending on the level of activity, we'll recommend at least three monthly treatments; for properties with an ongoing tick issue, we may do as many as seven applications in a year."

Julio says that three times a year is usually enough to get great control in the New Jersey market, as evidenced by Last Bite's callback rate: less than 2 percent. Farther north, in Maine, Peaslee recommends monthly applications throughout tick season. Nauert agrees. "We like to treat monthly through the summer, although it does depend on the customer's circumstances. If they don't live near woods or have a particularly bad infestation, then every other month — three times between spring and fall — might be enough."

How Often Do You Treat?

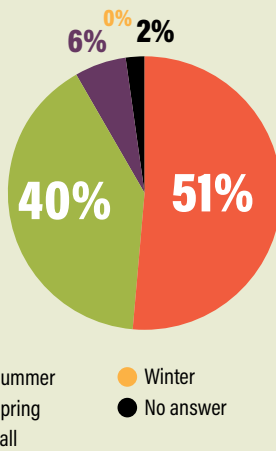
How often does your location provide tick control services to its typical client?



Source: Readex Research; Respondents: 129

Busy Season for Ticks

What season represents the largest share of your tick business?



Source: Readex Research; Respondents: 129

Remember to Take Care of Your Technicians!

Don't forget to remind your technicians to take sensible precautions before treating ticks: tucking pantlegs into boots, applying a repellent if you choose to provide them with one, and doing a thorough check of themselves upon leaving a tick account.



Treatment Methods

What control measures do you use to manage ticks? Which is your primary control tool?

	CONTROL MEASURES USED	PRIMARY CONTROL MEASURE
Residual pesticides	95%	80%
IGRs	40%	6%
Rodent control	26%	4%
Sanitation	20%	2%
Tick repellents	13%	4%
Tick boxes	11%	3%
No answer	0%	2%

Source: Readex Research; Respondents: 129

Heavy Tick Season Calls for an Effective Control Strategy

According to new research released by the Centers for Disease Control and Prevention (CDC), human cases of tickborne Lyme disease are on the rise. Experts estimate that there was a 6 percent increase in Lyme disease exposure due to the increased amount of time people spent outdoors, mostly in and around their neighborhoods during the COVID pandemic.

Since many people opted to stay local this year, walking, gardening and picnicking, tick prevention and treatment has never been more important to homeowners and communities alike. From tick monitoring to the most common infestation sites, this information can go a long way in helping you determine the right tick control strategy for your customers.

Defense for the UP↑TICK INTICKs

Be prepared for tick season with a combination of products and best practices that will help keep customers protected. Zoëcon has a lineup of highly effective adulticides with a variety of active ingredients and applications so you will be ready to fight ticks in a variety of accounts, including residential, backyards, public parks, and more.



To learn more about how to combat ticks and eliminate callbacks with Zoëcon® products, download our Tick Fact Sheet at Zoecon.com.

TIP ONE

DRAG IT OUT

Tick dragging can help determine if ticks are present around a client's property. To make a drag cloth, attach a wooden stick across the end of a white sheet. Then, attach a cord to both ends of the stick to pull the cloth through vegetation, checking the cloth every 30-60 seconds.

TIP TWO

KNOW WHERE TO LOOK

Common tick habitats include:

- Border areas of lawns
- Wooded areas
- Tall brush/grass
- Under leaves, under ground cover (plants) in yard, and in leaf litter
- Around stone walls and woodpiles



TIP THREE

TACKLE TICKS

Once tick-friendly areas are identified, treat with a perimeter treatment like Essentria® IC-3 Insecticide Concentrate—a natural option for controlling ticks that also has no pyrethroid restrictions. For broadcast treatment of lawns, ornamental gardens and trees without having to “water-in”, use Lambda 9.7 CS, a broad-spectrum micro-capped formula.



HOW DOES YOUR FIRM SELL TICK CONTROL SERVICES?

While nearly half (48 percent) of the PMPs PCT surveyed said that they sell tick control as a standalone service, many bundle them with other pest programs. At Last Bite Mosquito & Tick Control, for example, tick control is bundled with mosquito control. Jason and Jeremy Julio use a product that effectively controls both pests, so customers automatically get that coverage. If the tick infestation is more sustained, or the customer has a high level of concern, Last Bite tech-

nicians add granular applications to the protocol for an extra charge.

Josh Carver of Pro Turf & Pro Pest Solutions also bundles ticks with other pests. “Years ago, we sold tick control as a standalone, targeted service, but now we market it as a combined service. Although demand for tick control as a standalone service has grown over the past five years, with the products available today, it makes more sense for us to treat for fleas, ticks and chiggers at the same time,” he says.

Taking full advantage of this trend in demand, Bob Masters’ team at Masters Termite and Pest Control offers tick treatments proactively.

“When we discuss treatment options for customers’ quarterly general pest programs, we’re sure to tell them that we offer an organic tick spray,” he says. “That gets people’s attention and they usually want to hear more about it. Even if ticks aren’t a big issue for them, they like the idea that this safe application could help protect their families. So we build tick control into a lot of our quarterly plans, doing treatments in spring, summer and fall.” 🐜



SATISFACTION...BUT NO GUARANTEE?

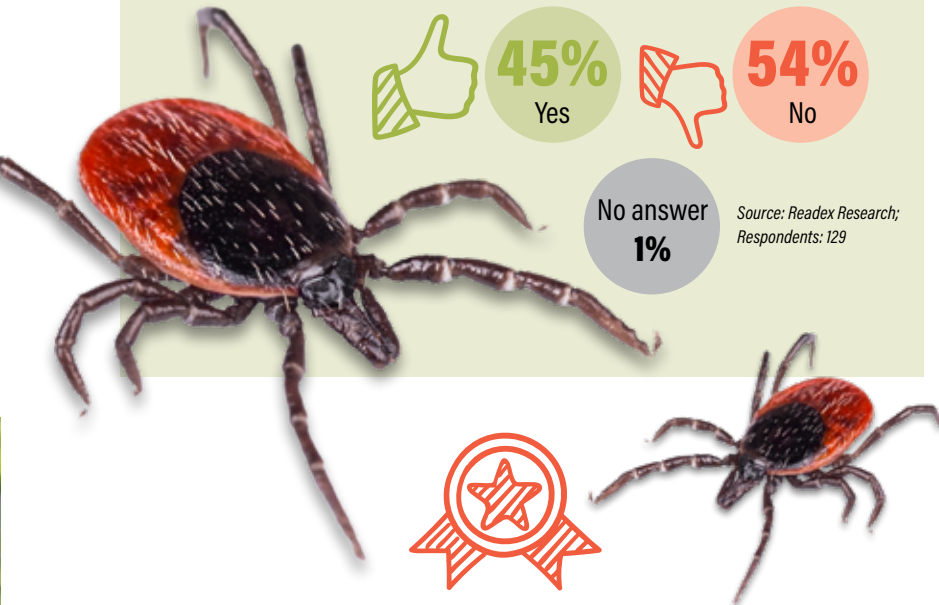
Tick callbacks are few and far between, according to those who participated in the 2021 State of Tick Control Market survey. The average callback rate was just 2.3 percent in 2020, and fully a third (34 percent) of respondents said they had no callbacks at all.

So why do fewer than half (45 percent) offer a guarantee on tick work?

"We offer a 30-day guarantee from the date of the most recent application, but I understand why many companies choose not to guarantee tick services," says Todd Barber of Barber's Best Termite and Pest. "There are too many uncontrollable factors — wildlife might regularly move through, the customer may not be treating their pets with flea and tick topical or oral treatments, the lawn may not be as well-maintained as it could be, etc."

Tick Control Guarantee?

Do you offer a guarantee?



WHAT ABOUT TREATING FOR TICKS INDOORS?

While most tick species prefer outdoor living, some species — the brown dog tick, for example — can thrive indoors when they have a host. People with pets may need an indoor treatment in conjunction with outdoor measures.

"We use a residual liquid insecticide with a synergist for knockdown and follow that up with two more treatments to eliminate the issue," says Barber. "It's important to mix in an IGR for indoor applications to provide your customer with a longer-lasting solution."

Focus applications where the family pet spends the most time, Barber adds, as well as anywhere the customer may have spotted a tick.



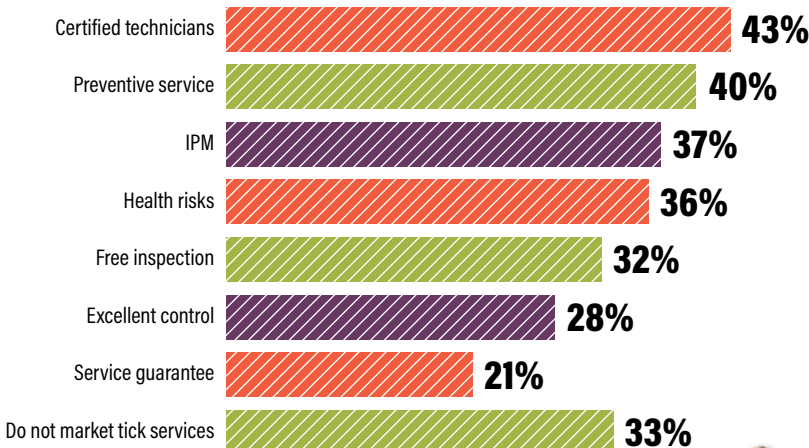
48%

**SELL TICK CONTROL AS A
STANDALONE SERVICE**

Source: Readex Research; Respondents: 129

What Do You Tout in Your Tick Marketing?

What aspects of your tick control service are featured in your marketing efforts?



Source: Readex Research; Respondents: 129



WHAT CUSTOMERS KNOW -OR NEED TO KNOW

... ABOUT DISEASE

Lyme disease may have become the darling of the media the past few years, but those in the business of pest management know that there are *plenty* of human diseases transmitted by ticks. Rocky Mountain spotted fever, Heartland virus, Colorado tick fever — the Centers for Disease Control and Prevention (CDC) lists 16 in all on its website.

Consumers are becoming more aware of the dangers of coming into contact with ticks. In fact, 62 percent of pest management professionals told PCT they believe their customers see ticks as a public health threat.

This is a far cry from the past, when customers simply didn't know as much about ticks.

"Five years ago, we had to educate customers about tick-borne diseases, but today, with Lyme disease in the news at least a couple of times a year, there's much more awareness," says Josh Carver of Pro Turf & Pro Pest Solutions. "Now that we're seeing more lone star ticks, we need to make them aware of southern tick-associated rash illness [STARI], too. It's different from Lyme disease in that the symptoms aren't chronic, but it can still require treatment and cause people a lot of distress."

Jason Julio of Last Bite Mosquito & Tick Control says that his team still gets a lot of questions about tick-borne diseases. "People are scared of what they don't know, so I point them to resources — namely, tickcounter.org [University of Rhode



Island], because it has a lot of great information," he says. Jason and Jeremy Julio also push information out on social media and post it on their website. To build greater community awareness, they participate in events to raise funds for patients of Lyme disease through the LymeLight Foundation. "It's a great way to give back and raise awareness of the risks associated with ticks," Julio says.

... ABOUT DOING THEIR PART IN TICK CONTROL

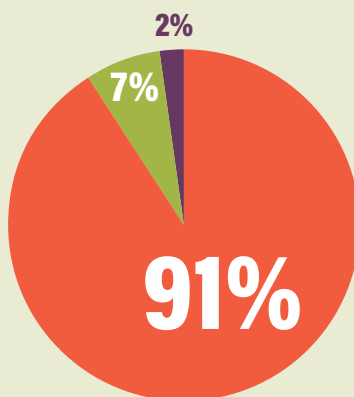
As with most pests, customer collaboration is essential to excellent tick control. For this particular pest, customer responsibilities fall into two areas: maintaining their yards and taking good care of their pets to ensure they're not serving as hosts.

Let your customers know they can help resolve their tick issues, and protect their families and pets, by doing the following:

- Keep the grass low
- Eliminate standing water, which can attract wildlife hosts as well as ticks
- Clear brush, leaf piles, debris and clutter
- Keep mulch beds clean
- Stack wood neatly
- Trim weeds
- Keep play areas off the tree lines
- Have a designated area for pets (don't let them run through the woods)
- Take pets to the vet or choose proven, reputable tick and flea products, and use them according to instructions 🐾

Ticks as a Public Health Threat

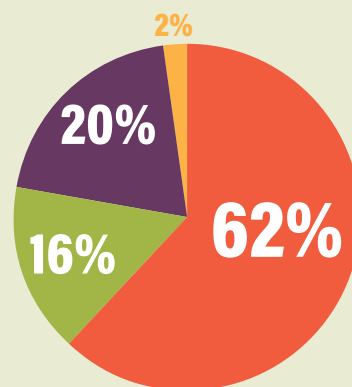
Do you consider ticks a public health threat?



● Yes
● No
● Don't know

Source: Readex Research; Respondents: 129

Do your customers?



● Yes
● No
● Don't know
● No answer

Source: Readex Research; Respondents: 129



95%

**SAY RESIDENTIAL
ACCOUNTS BRING IN THE
MOST TICK REVENUE**

Source: Readex Research; Respondents: 129



About the Survey

The 2021 State of the Tick Control Market survey was sponsored by Central Life Sciences/ Zoëcon and compiled by Readex Research, a privately held research firm in Stillwater, Minn.

A sample of 4,263 pest control company owners, operators, executives and technical directors was systematically selected from the PCT database. Data was collected from 164 respondents — a 4 percent response rate — via online survey from April 7-14, 2021. The margin of error for percentages is plus or minus 7.6 percentage points at the 95 percent confidence level.

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