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2022 State of the **FLEA CONTROL** Market Report

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92%

company locations offering
flea control services

Source: Readex Research; Number of
Respondents: 139

FLEA WORK: Steady Income + Foot in the Door

Flea control services produced consistent, but not significant, revenue for pest management companies last year. On average, flea services generated \$26,900 or 4 percent of overall revenue for PMPs in 2021, found the 2022 PCT State of the Flea Control Market survey. The survey was sponsored by Zoëcon/Central Life Sciences and compiled by Readex Research, an independent market research company.

The percentage of revenue created by flea control services remained the same over the past three years for 59 percent of pest control company locations and increased for 20 percent.

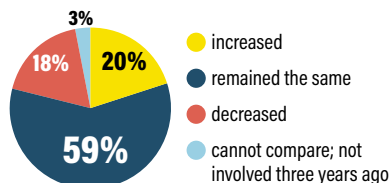
In Southwest Oklahoma, drought has intensified the flea problem and the region also has sandy soil, which fleas love, said Chad Highley, owner of Environmental Pest Control in Lawton.

As a result, controlling fleas “represents a fair amount of the jobs that we do. We have several customers that are just fleas only,” he said. Flea control accounts for 10 to 12 percent of the work performed by the company.

Less precipitation in the Houston, Texas, area, also has led to flea work “increasing every year,” said Greg Schoch,

CALLS CONSISTENT

How has the percentage of your location’s revenue generated from its flea control services changed in the past three years?



Source: Readex Research; Number of Respondents: 128

president of Anytime Pest Elimination in Baytown. Flea control accounts for 10 percent of service revenue at the company.

“Fleas are really bad here,” said Schoch. While they’re more problematic in spring and summer, they can be a year-round issue. “It’s nonstop,” he said.

Flea control isn’t the money maker it was in the 1980s and early ’90s. “Flea control has diminished tremendously,” said Charles Fyfe, who has worked in pest management for 40 years. The owner of Envirocare Pest Control in Gardiner, Maine, attributed the drop to the introduction of on-pet flea treatments. Currently, flea control accounts for about 2 percent of Envirocare’s overall revenue.

Nor is flea work a big part of the business at Ja-Roy Pest Control, a Rentokil company in Covington, La.. From spring through fall, the company performs five to six flea treatments a week, generating less than 1 percent of revenue overall.

Still, flea service is “something we’ll always offer and be able to knock out,” said Trent Johnson, area district manager for Ja-Roy.

Successful control of fleas is an opportunity to sell quarterly pest control service to satisfied customers. “We’ve kind of got a foot in the door; they’re happy with what we did, so we do try to get them into a recurring program,” said Johnson. 🐾

\$26,900

average revenue
generated from flea
control services
in 2021

4%

average percentage
of overall service
revenue generated
from flea control

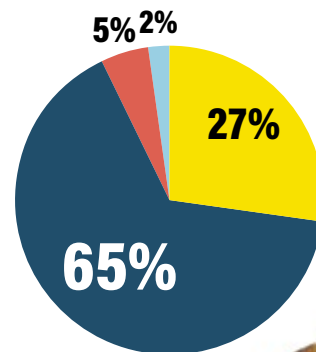
Source: Readex Research; Number of Respondents: 128

FLEA FORECAST: More of the \$ame



EXPECTATIONS CONSISTENT

Compared with 2021, how do you anticipate the percentage of your location's revenue generated from its flea control services to change in 2022?



- increase
- remain the same
- decrease
- no answer



Source: Readex Research; Number of Respondents: 128

Most PMPs (65 percent) expected the percentage of revenue generated from flea control services at their locations to hold steady in 2022, found the PCT State of the Flea Control Market survey.

“I don’t expect any factors that are going to increase or decrease it,” said Trent Johnson, Ja-Roy Pest Control.

Trey Howard, president of Bug Out Pest Solutions in De Queen, Ark., likewise anticipated flea control revenue to stay constant in 2022 with wildlife issues the potential wild card.

“In the last 20 years, the amount of wildlife that we encounter is a lot more,” said Howard. Critters carry fleas, which infest yards and homes when the animals find their way into and under dwellings. With fewer hunters and more homes being built in natural areas, encounters with flea-ridden wildlife will increase, he said.

According to the PCT survey, 27 percent of PMPs anticipated flea control service revenue to increase, while 5 percent expected it to decrease.

Charles Fyfe of Envirocare Pest Control was planning for less flea revenue this year. Even the rise of pandemic pets didn’t increase flea work for the company.

“In fact, it started to drop off, and my theory is that people were confined to their homes and spending more time cleaning,” he said. Regular vacuuming helps minimize indoor flea infestations, said PMPs in follow-up interviews. 🐜



About the Survey

The PCT 2022 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 5,372 U.S. pest control business owners, executives and technical directors was systematically selected from PCT and another pest control industry database. Data was collected from 139 total respondents — a 3 percent response rate — via online survey from May 10-25, 2022. Respondents who did not offer flea control services were eliminated. The margin of error for percentages based on the remaining 128 respondents is ±8.6 percentage points at the 95 percent confidence level.

Numbers may not equal 100 percent due to rounding.



Problem Species + Their Sources

The most common flea species encountered by PMPs were cat fleas (86 percent), dog fleas (58 percent) and sand fleas (14 percent), found the 2022 PCT State of the Flea Control Market survey.

These fleas did not appear in greater numbers. In fact, 60 percent of PMPs said the incidence of flea infestations remained constant in their markets over the past year.

What caused customer flea prob-

lems? A common reason, said PMPs in follow-up interviews, was customers not treating their pets with topical flea treatments, whether supplied by the veterinarian or purchased over the counter.

Customers without pets got fleas from their neighbors' pets, especially in communities with small yards, and from wildlife.

"Occasionally people will end up with a flea problem because of mice

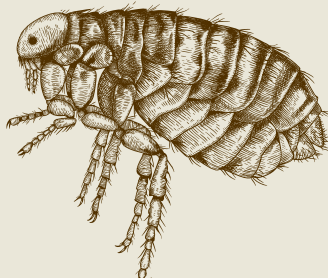
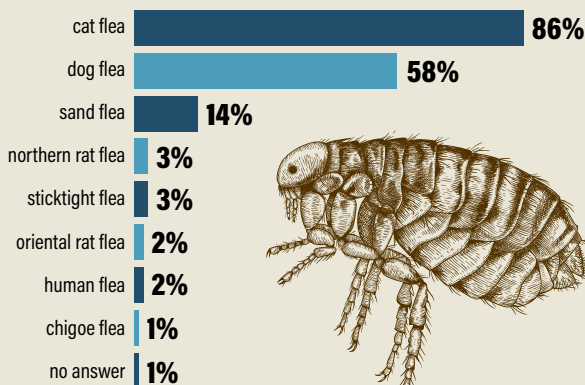
coming into the home, squirrels. The ectoparasites come in that way," said Charles Fyfe, Envirocare Pest Control.

When PMPs did get called to control fleas, the problem often was significant.

"Fleas don't make up a great deal of what we do, but when people call for fleas it's a situation that's so extreme that 99 percent of the time, they've already tried to fix it themselves and only made it worse," said Trey Howard, Bug Out Pest Solutions. 🐜

CAT FLEAS CAUSE CALLS

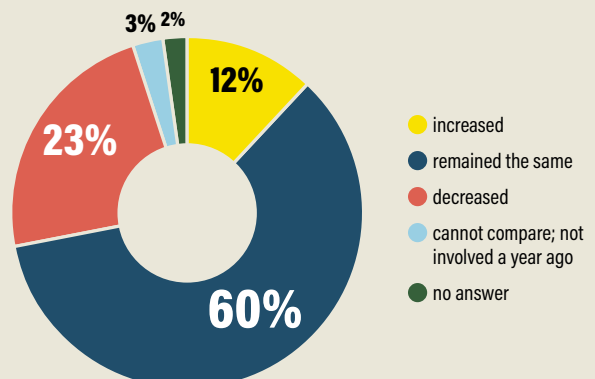
What flea species are common in your market area?



Source: Readex Research; Number of Respondents: 128;
Respondents could select more than one answer

FLEAS ARE FLAT

Over the past year, do you feel the incidence of flea infestations has increased, decreased or remained the same in your market area?



Source: Readex Research; Number of Respondents: 128

SERVICE: Mostly Separate, More Involved

More than three quarters (79 percent) of pest control companies provided flea control as a separate service, found the 2022 PCT State of the Flea Control Market survey. Only 13 percent included flea control in general pest control service, and 8 percent provided it as part of a bundled service targeting other yard pests, such as mosquitoes and ticks.

At Bug Out Pest Solutions, flea control is a separate charge because of the time required to do the service and the cost of materials needed to perform an outdoor treatment. In southwest Arkansas, the average size of a yard is one acre. “This is rural America,” explained Trey Howard, who discounts the price of flea service for existing quarterly service customers.

The average price charged for a residential flea control job was \$233. Successful control usually required two or more flea treatments, said PMPs in follow-up interviews.

“Flea treatments are costly because you need to do the two treatments. There’s normally going to be some kind of callback or retreatment in there that

you’re going to have to cover yourself for. They’re a little more difficult to kill than ants or some other kind of pest. You have to be really on top of it and really thorough,” said Greg Schoch, Anytime Pest Elimination.

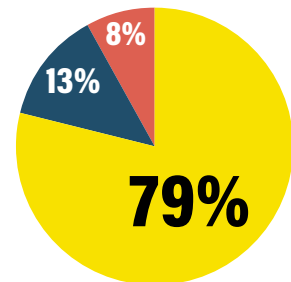
Solving a flea problem also may incur the cost of other services. “There are several different service types that you end up engaging just to solve the main complaint,” explained Chad Highley, Environmental Pest Control. For instance, if wildlife or rodents are causing the problem, additional costs may be incurred for trapping, removal and exclusion, which in his market can add \$400 to \$600 to the job, he said.

According to the PCT survey, a typical residential flea job took 1.1 hours on average to complete, and 75 percent of pest control company locations guaranteed their flea control service.

PMPs said they encouraged customers with recurring flea problems to sign up for quarterly pest control service. “It’s going to be cheaper for them, and we can control more than fleas at that point,” said Trent Johnson, Ja-Roy Pest Control. 🐾

SEPARATE SALES

Is flea control included with your location's general pest control service or is it provided as a separate, add-on service?

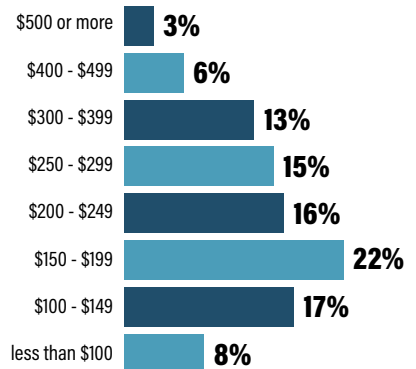


- provided as a separate service
- included with general pest control
- provided as part of a bundled service that also targets other yard pests (e.g., mosquitoes, ticks)

Source: Readex Research; Number of Respondents: 128

CASHING IN

How much does your location charge for a typical residential flea control service job?



Source: Readex Research; Number of Respondents: 127

GUARANTEE? CHECK!

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



Source: Readex Research; Number of Respondents: 128

1.1 hours

average time spent on a typical residential flea control job

Source: Readex Research; Number of Respondents: 127



HANDLING THE THREAT

FLEAS POSE TO PEOPLE AND PETS



PESKY FLEAS AND THEIR IMPACT ON PETS

Although fleas can wreak havoc at any time of year, warmer months are the prime time for these external parasites. Dog and cat owners should be especially wary, watching for signs of a flea

infestation. When it comes to pets, fleas don't just cause discomfort - they also carry diseases, such as

flea-borne typhus or cat scratch disease. If a dog or cat is compulsively scratching or chewing at their skin, that's one of the first signs to check for fleas. Check early and often if a problem is suspected. The pet's scratching and chewing reaction can cause uncomfortable skin irritation, or even patches of hair loss. Upon further inspection, it's possible to see the tiny brown fleas moving across the pet's haircoat, although they're incredibly small. If left untreated, fleas have the potential to further impact the health of pets.



THE THREAT FLEAS POSE TO PEOPLE

Pets aren't the only potential hosts for fleas on the loose, either. Although they are secondary options for fleas, humans can also be impacted. People without pets can overlook the possibility for fleas, but the threat exists if adults and children are in a flea-infested environment. Typically, adult fleas impact humans who walk or crawl by if an animal host is not immediately available. Flea bites on humans can often be detected as small red spots around the feet, ankles, or lower legs. As animals are the preferred host due to the hair coverage they provide, humans with hairy legs, chests, and arms can be particularly susceptible to flea spread. Adverse reactions to flea bites include hives, rashes, or secondary skin infections caused from scratching. In extreme allergy-related cases, flea bites can cause swelling, nausea, or breathing issues.



FLEA PROTECTION & PREVENTION TIPS

Fleas must be stopped from reproducing in order to control an existing problem. For homes with pets, areas where animals spend the most time will be the most likely hotspots for adult and developing fleas. This can include living rooms, bedrooms, and any carpeted areas. Keeping these spots clean is the best method for prevention, or from stopping a small problem from becoming a major issue.

Outdoors, fleas prefer shady areas with lots of coverage. Checking pets for fleas after they've spent a good deal of time outdoors or in the company of other animals is another best practice. Flea problems vary greatly between pets and households. Consulting a pest management professional for effective treatment, protection, and prevention tips are always the best bets for flea control.



With flea populations threatening pets and humans alike, effective and widespread control is needed across the United States. The Zoëcon® brand offers products that can help protect people and animals from harmful fleas. Powered by the insect growth regulator (IGR), (S)-methoprene, the Precor® lineup from Zoëcon® Professional Products offers a variety of professional flea products that deliver 7 months of protection from flea emergence. Petcor® 2 Flea & Tick Spray is a dog and cat flea spray formulated with (S)-methoprene. This insect growth regulator prevents flea larvae from developing into breeding, biting adults. Products like these are vital for keeping homes and communities free from flea-borne diseases.

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ZOËCON
Professional
Products



5.3%

average callback rate for
flea control services

Source: Readex Research; Number of
Respondents: 128

SERVICE CHALLENGE #1: Engaging Customers

PMPs said they need customer help to control fleas. This starts with prepping the site before treatment, such as by vacuuming, picking items up off the floor, washing pet bedding and cutting the grass.

As well, 39 percent of PMPs said their locations encouraged customers to have their pets treated with veterinary or over-the-counter flea treatments, found the 2022 PCT State of the Flea Control Market survey.

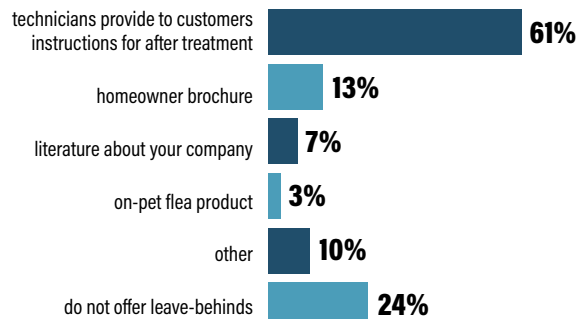
“There’s a whole lot of other things involved where you need customer cooperation to get the job done right. Not everybody does that. Not every customer is a good customer,” said Greg Schoch, Anytime Pest Elimination.

Trent Johnson, Ja-Roy Pest Control, agreed. “There’s a lot of prep work that we ask to be done before we get there. If that’s not done, we don’t go along with it because it’s going to make us look bad because the problem is not going to be solved if they haven’t helped us on their part.” His technicians occasionally pick up items left out accidentally, but “we’d rather not handle personal belongings.”

When customers don’t cooperate, some PMPs said they try to reschedule treatments or target previously inaccessible areas during follow-up visits. Others said they encourage customers to perform treatment themselves using do-it-yourself products, which they sell.

AFTER CARE

When your location treats for fleas or other pests, what leave-behinds do your technicians provide to customers?



Source: Readex Research; Number of Respondents: 128; Respondents could select more than one answer



Jim Ramey, co-owner of Lu-Crest Pest Control in Perrysville, Ohio, took steps over the years to train his property manager clients on flea control. They now understand why it is more effective to treat empty apartments after the carpet is cleaned and before new tenants move in. This approach benefits all involved: clients, tenants and Ramey.

“We give them a discount because (the unit is) empty. There’s no furniture to move around. It’s much quicker and the results are going to be much better,” said Ramey.

Customer help is just as important post-treatment. The PCT survey found 61 percent of PMPs leave behind instructions for clients to follow post treatment, and 3 percent leave behind on-pet treatment products.

A failure to cooperate leads to callbacks, which averaged 5.3 percent for flea control service.

Good communication helps set expectations for the service, which makes for more satisfied customers.

At Ja-Roy Pest Control, technicians explain the flea life cycle and why that requires them to return in two- to three-week intervals until the problem is resolved. “We let them know that upfront. That way they’re not expecting a miracle after just one treatment,” said Trent Johnson.

Don’t merely tell customers what they need to do before and after treatment; tell them *why* they need to do it. “That’s how you will get a lot of cooperation on their end; if they understand why they’re having to do things,” said Johnson.

Charles Fyfe, Envirocare Pest Control, educates customers about what they do on their own first to prevent and minimize flea introductions before they choose chemical control. “Once I explain the mechanical things they can do — vacuuming, cleaning, having the pets treated professionally by a vet — that usually resolves the problem for them,” he said. 🐾

SERVICE CHALLENGE #2: Finding the Source

Sometimes the source of a flea infestation is obvious; other times, not so much.

“Good initial inspections” are key and are “going to help you out a lot,” said Trent Johnson, Ja-Roy Pest Control. If fleas jump on you at an account, don’t just say, “Yeah, you’ve got fleas’ and start spraying,” he said.

Instead, identify where pets spend most of their time. Dogs may be confined to one area of the home or have free range and sleep on the customer’s bed. Cats are known to hang out on windowsills, mantels, the backs of upholstered furniture and on top of refrigerators. They even may get up into drop ceilings or the floor void if they have access.

If customers don’t have pets, determine if wildlife or rodents are the source of the problem. One of Johnson’s customers kept getting bit by fleas in his shed. Turns out, a raccoon was living in it.

An often-missed area for treatment is the crawlspace or underneath pier-and-beam-constructed houses where feral cats, skunks, possums, raccoons and rodents hunker down and the fleas come up through the floor. Customers “may not even know that there’s some kind of wildlife underneath their house,” said Greg Schoch, Anytime Pest Elimination.

Squirrels and rodents that get into attics and basements bring in fleas. Wild animals also drop fleas in yards as they’re passing through. A full-blown flea problem can develop if a yard is shady and has a high level of animal activity, said Trey Howard, Bug Out Pest Solutions.

“If you’re not finding the source and taking care of it, then you’re not taking care of the problem and you’re going to just keep chasing your tail,” said Chad Highley, Environmental Pest Control.

According to the 2022 PCT State of the Flea Control Market survey, 24 percent of PMPs include source reduction or sanitation as part of their flea treatment protocol. 🐾





GO-TO TREATMENT: Insecticide + IGR

Flea control service generally involves indoor (91 percent) and outdoor (78 percent) treatments, found the 2022 PCT State of the Flea Control Market survey. One third (33 percent) of pest control companies also include follow-up inspections in their flea control protocol.

When Bug Out Pest Solutions gets a call for flea control, it's often for a major infestation. "Usually it's multiple treatments; at a minimum of two, sometimes three applications. Generally, it's an inside and outside problem," said Trey Howard.

Most PMPs (88 percent) rely on a combination of general use insecticide and insect growth regulator (IGR) as their primary treatment regimen for controlling fleas, found the survey.

It's "foolish" not to use an IGR, said Jim Ramey, Lu-Crest Pest Control. IGRs mimic the flea's juvenile growth hormones and stop the development of flea eggs and larvae.

Adult fleas will still emerge from pupae, however, hence the need for follow-up inspections.

In post-survey interviews, PMPs said they used liquid sprays that combine an insecticide and IGR to treat interior floors and outdoor hot spots. Combination aerosol products were used to target cracks and crevices of upholstered furniture where pets spend time and other hard-to-treat areas like underneath furniture.

Ramey uses an aerosol flushing agent when dealing with severe flea infestations. He will apply it to the mantle where the cat sits, for instance, killing some fleas on contact and making other fleas jump to the floor, which is treated.

In crawlspaces, which may harbor flea-ridden wildlife, Trey Howard of Bug Out Pest Solutions, applies insecticide-desiccant dust with a power duster.

"Using a power duster on the crawlspace helps us eliminate a lot of those hidey holes and nooks and crannies that

the fleas are going to be hiding in,” said Howard. The process takes minutes, and the dust provides six to eight months of protection.

Outdoors, Howard applies a time-release granular material, which he said lasts longer than a liquid insecticide application.

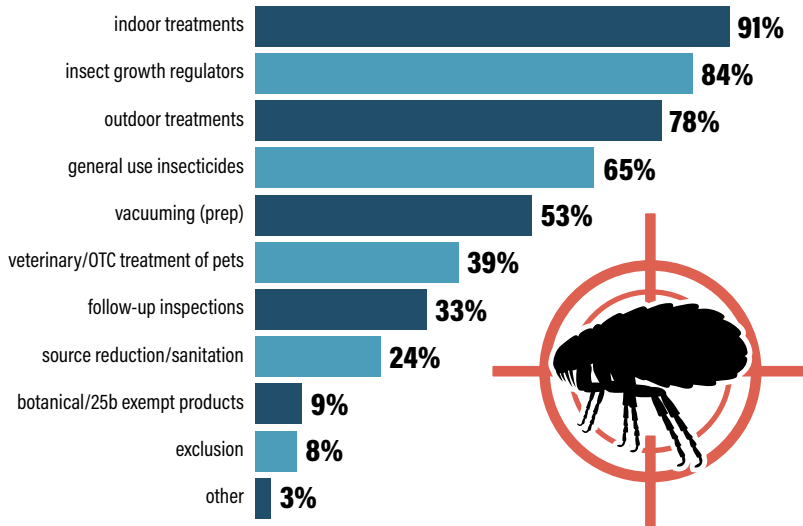
An associate certified entomologist, Chad Highley, Environmental Pest Control, urged PMPs to rotate classes of chemicals used for quarterly pest control services as he has come across

insecticide-resistant flea populations in his market.

“Pay attention to what works. If you’re certain that you did a solid service to begin with, start looking for other factors; start looking for why the service failed. Consider all possibilities. If you’ve ruled out everything and you’re still having a repeat issue, then you might try a different set of chemicals. You may have run across a resistant population, which we do from time to time,” he said. 🐜

BIG TOOLBOX

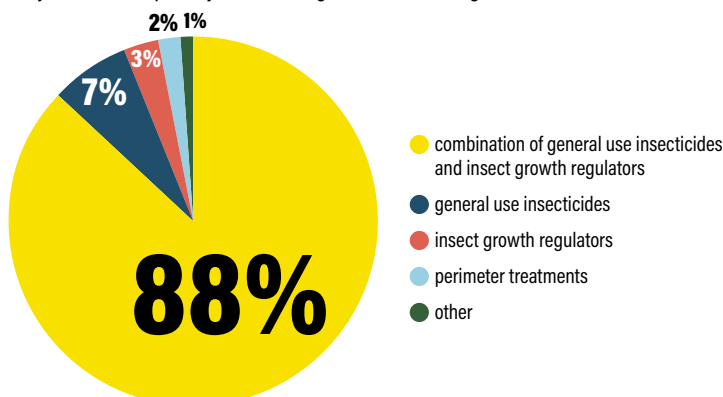
Which service protocols are included in your location's flea control programs?



Source: Readex Research; Number of Respondents: 128; Respondents could select more than one answer

INSECTICIDES RULE

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



Source: Readex Research; Number of Respondents: 128

Vacuum Power

According to the 2022 PCT State of the Pest Control Market survey, 53 percent of PMPs encouraged customers to vacuum as part of their flea service protocol. This included vacuuming carpet and hardwood floors before and after treatment.

“We have found the vacuum is one of the larger pieces of the puzzle to correcting the problem inside,” said Chad Highley, Environmental Pest Control.

Vibrations made by the vacuum agitate flea pupae, causing adult fleas to emerge from their cocoons. They think the vibrations are caused by a walking blood meal. “They jump out of their little cocoons and jump right into the vacuum,” said Highley. Emerging fleas that don’t get sucked up encounter the residual insecticide application.

To successfully control fleas, it is essential to break the flea life cycle. Vacuuming speeds this process up, which is important considering cat flea pupae can lie dormant for months.

In follow-up interviews, PMPs said they asked customers to vacuum after treatment three to seven days a week for one to four weeks. Trey Howard, Bug Out Pest Solutions, said he asks customers to vacuum more often than perhaps necessary because he knows they’ll do less. “No one ever follows the directions,” he said.

Jim Ramey of Lu-Crest Pest Control encourages clients to run oscillating fans on the floors of treated rooms to fool flea pupae into emerging. The “rustling” of the fans works just like the vibrations of the vacuum, he said.





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| • Heavier-than-air molecule penetrates deep into carpets and upholstery where flea larvae develop | ✓ | |
| • IGR utilized in leading vet dispensed topically applied flea control treatments for dogs and cats | ✓ | |
| • Protects stored grain products from insect infestations | ✓ | |
| • Market leading government agency IGR for mosquito control larvicides* | ✓ | |
| • Prevents flea emergence for up to seven months | ✓ | ✓ |
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