

2023 State of the **FLEA CONTROL** **MARKET REPORT**



INSIDE:

- » Flea Programs Essential and Growing
- » Where the Fleas Fester
- » Why a Multi-Pronged Indoor/Outdoor Approach?
- » Curbing Callbacks
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Scratching the ITCH



While not a huge part of the overall service mix, flea programs are certainly essential and growing for some pest management professionals.

That bites! Those two words mean a flea infestation is already underway. And nearly 20 percent of respondents to PCT's annual State of the Flea Control Market survey, which is sponsored by Zoëcon/Central Life Sciences, say the pressure is on. In some regions, these bloodsuckers are going to present more of a problem for clients this year compared to past seasons. Though, a majority expect the same flea pressure.

"Mostly, people call when they are getting bit and they say, all of a sudden, their house exploded with fleas — and typically you'll see this in the distal part of extremities: from the knees down, and elbows down to the hands," said Chad Highley, president of Environmental Pest Control in Lawton, Okla. "It's not like a mosquito or bed bug that

will bite anywhere that is exposed."

Don't necessarily point fingers at the canine and feline family members as the cause of the problem.

"We have had several flea calls in places that do not have their own pets," Highley said. "We'll find that they have nice harborage for squirrels, raccoons, possums and rodents — or the fleas are next door and they travel."

While cat and dog fleas are most common — representing 88 and 56 percent of fleas identified on clients' properties — there is definitely a wildlife connection. "We have clients with cats who never go outdoors and the fleas are coming in from squirrels or inadvertently carried by clients, and the issue manifests and they can't figure out why," said Dennis Mastrolia, owner, Dennis the Mennis

Pest Elimination Experts, Lynn, Mass.

Indeed, flea demand is often related to "a call from the wild."

"We're seeing an influx of commercial customers call and mostly because they are lacking wildlife control or exclusion," said Camille Landry, owner of FullScope Pest Control near Houston. "We'll go out to service for fleas and the technicians see droppings. We try to inform them that this pest and wildlife, unfortunately, go hand in hand. We need to do exclusion and then we can control the secondary problem, fleas."

Overall, fleas are a fairly small part of PMPs' service mix. According to the survey, 91 percent of respondents provide flea control and 77 percent of those offer it as a stand-alone service, while 15 percent integrate it into a general pest

control package. Forty-two percent say flea control is 1 to 2 percent of total revenue, with 21 percent estimating it at 3 to 4 percent, and 18 percent of participants figuring fleas account for 5 to 7 percent of business income.

In the past three years, 56 percent of PMPs said the percentage of revenue generated from flea control at their location remained the same. It increased for 21 percent, and decreased for 20 percent.

“Our flea work is no more than 2 percent,” said Doug Foster, president, Burt’s Termite & Pest Control, Columbus, Ind. “It has increased a little bit, but it’s certainly not a hockey stick. It’s almost like watching the stock market. It’s going up a few percentage points every year.”

Foster noticed an uptick during the pandemic. “I’ve been talking to other pest management professionals about that, and we’re thinking that when people were working from home, more of them were getting pets,” he said.

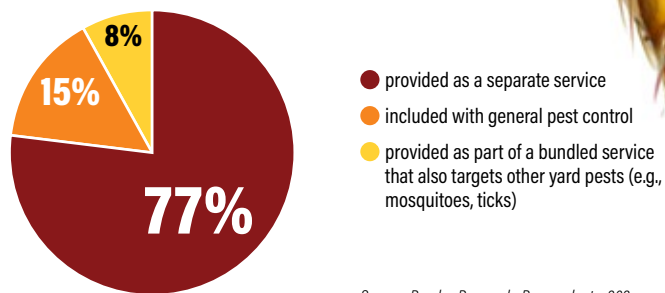
Of PMPs surveyed, 19 percent see an increase in the incidence of flea infestations, and 21 percent see a decrease. There’s no change for 55 percent of respondents.

While not a huge part of the business, flea work is an essential service. “It’s not significant,” Highley said. “But it’s one of those things that we do have a specialized plan for, so whenever someone calls in with a flea problem, we can propose a solution — and anything else we find on the property once the technician gets there, we can recommend and upsell additional services as needed.”



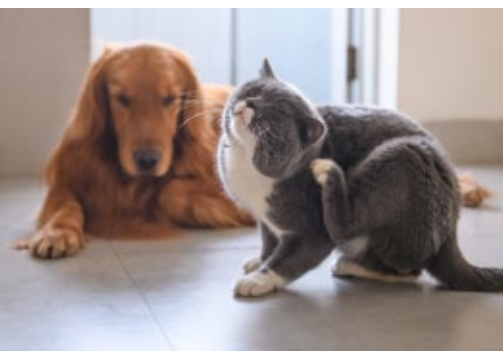
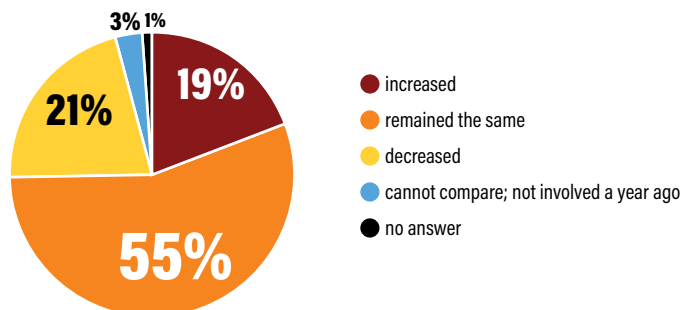
A Stand-Alone Service

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



Frequency of Fleas

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



ABOUT THE SURVEY

The PCT 2023 State of the Flea Control Market survey was sponsored by Zoëcon/Central Life Sciences and compiled by Readex Research, a privately held research firm in Stillwater, Minn. A sample of 4,697 pest control company owners, operators, executives and technical directors was systematically selected from PCT and industry databases. Data was collected from 223 respondents — a 5 percent response rate — via online survey from April 17-May 5, 2023. The margin of error for percentages based on the 202 respondents whose company location provides flea control services is ± 6.8 percentage points at the 95% confidence level. Charts may not add up to 100 percent due to rounding.



Under **PRESSURE**

Where the fleas fester – cool, dark, low, inside and out.

Outdoor areas with little to no ground cover, crawl-spaces with open entries and uncovered vents act like revolving doors for fleas. “[Fleas like] dark, secluded areas like carpeting under beds and spaces between the 90-degree angles where walls meet floors,” said Dennis Mastrolia, owner of Dennis the Mennis Pest Elimination Experts in Lynn, Mass.

Those are some of the stomping grounds fleas prefer. Of course, hanging out on dogs and cats is a biggie — and humans are hosts, too. “Most pets have run of the house, so thoroughness [of the inspection] is important,” Mastrolia added.

Mobile home refinishers are reporting flea issues in Texas, said Camille Landry, owner of FullScope Pest Services near Houston. “Mechanic shops where the bays are open — animals can come in and out,” she added.

And look down. Common to Landry’s area, pier and beam foundations consist of concrete and wooden support beams

that support a home. The foundations are elevated, usually 2 feet off the ground. Critters like to hang out underneath, and they come with fleas.

“When technicians know this before they show up, that really helps,” Landry said. “In some cases, we’ll try to put an IGR underneath those cool, very damp and dark areas, and that has really seemed to control exterior populations.”

Garages are also a culprit. “People don’t think about the fact that their cat is walking through the garage, or they accidentally leave the door open at night,” Landry said, adding that this is how fleas often end up indoors: riding on the back of a four-footed family member.

Unruly lawn areas and leaf litter are also breeding grounds. Landry likes to see those cut back and cleaned up. “We communicate with customers and reinforce that they have to participate, otherwise we will struggle,” she said.

In general, Landry sees more flea pressure every year.

“After a couple mild winters, there is an influx, and in our area, there is so much land clearing and construction that they are pushing wildlife into developed backyards,” she said. “So now, animals that used to live in the woods are visiting yards, and we relied too heavily on [treating fleas] on our dogs and cats.”

The majority of flea work is residential service. “Rarely do we get a storefront with a flea issue,” said Chad Highley, president, Environmental Pest Control, Lawton, Okla. “Usually, it’s a residential structure, either individually owned or managed.”

In fact, the company manages pest services for several kennels and veterinarian offices. “We rarely hear anything about fleas in those,” he said.

Meanwhile, timing is also of the essence when it comes to flea pressure, as with most pests.

“During late spring, we see a high volume of fleas and it also peaks in late summer,” Highley said. “I think it’s primarily based on the rodent traffic times — whether they are moving out of their overwintering spots to find harborage and breeding grounds, or in late sum-

mer when they are getting ready for winter, so they are on the move looking for a spot. It’s often about rodents coming or going from their winter hangouts.”

For this reason, nearly all of Highley’s flea service calls include rodent or wildlife control. “The two are very closely interrelated,” he said.

Doug Foster notices a tie between vacation time and flea calls. “A lot of people do not take their pets with them on trips, so if they take them to a boarding center, they can have some fleas and end up bringing them home,” said the president of Burt’s Termite & Pest Control, Columbus, Ind.

Or there is already a light case of fleas at home, a pet is boarded and the family waits a couple days after vacation to pick up their fur friend.

“As long as the pets are there, the fleas are content — but when it is not there, they are still hungry, so all of the sudden, the people in the house are dinner,” Foster said.

Temperature is a factor, too.

“Over the last few years, as the temperatures have warmed up across the country as a whole, we’ve been seeing fleas come out as early as March and

hanging around sometimes through December,” said Jim Regan, technical advisor, Cowleys Pest Services, Farmingdale, N.J. Reflecting back to the early 2000s, fleas were biting in April and calmed in late October, he said.

“When the temperature hits in the 70s, that’s when the fleas begin to take off,” Regan said. “The humidity is just right. And once the temperatures drop into the 40s, the fleas die off.”

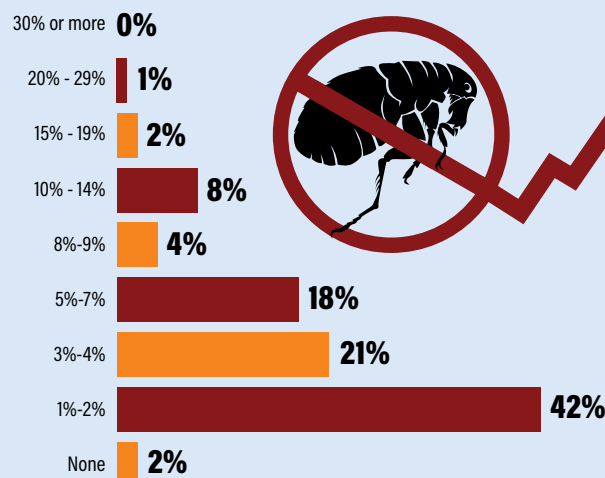
Regan also notices that properties located on sandy soils tend to present with more flea issues, at least along the Jersey coast. “The shore towns are usually hit very heavy for us,” he said.

Landry says flea work makes up about 8 percent of service tickets at her company, and it’s a year-round business. “There’s not much of a lull,” she said, adding that nearly all calls come from homeowners and many of them property management companies. Given the warmer-weather location, it’s always “the time” for pests, including fleas.

So, Landry works to get customers into a prevention mindset. “That way, we don’t have to deal with a horrible infestation where everyone in the house is getting bitten.” 🐾

Small, but Key, Source of Revenue

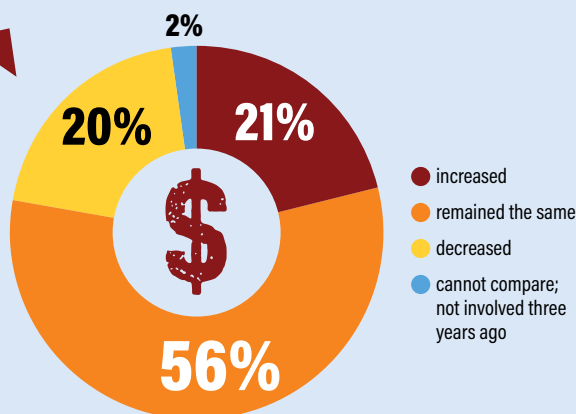
What percentage of your location’s overall service revenue is generated from flea control services?



Source: Readex Research; Respondents: 202

Growth Remained Steady

In the past three years, has the percentage of your location’s revenue generated from its flea control services increased, decreased or remained the same?



Source: Readex Research; Respondents: 202

THE BENEFITS OF DOING IT RIGHT THE FIRST TIME

What is your time worth? For pest control operators, time is money when it comes to flea control. But frequent callbacks and repeat treatments can put a significant dent into your operation's overall profitability.

Keep reading to see the costs associated with callbacks and learn how to achieve around the clock flea control that helps maximize your time and your bottom line.

When compared to other insects, fleas are one of the most frequent reasons for callbacks. In fact, fleas represented 5.2% of all reported repeat treatments in 2021, which was the second-highest rate behind mosquitoes. While that number might seem low on the surface, callbacks for flea control can be costly in several areas.



TIME AND LABOR

Every callback requires a technician to spend precious time out of their schedules returning to a previously treated site. Instead of doing initial treatments, or finding new accounts, your labor costs are spent on the same sites, which can hurt your operation's growth.



FUEL CONSUMPTION

Callbacks reduce the fuel efficiency of your fleet, leading to increased mileage and fuel costs. Repeat trips to an application site result in more frequent trips to the pump.



REPUTATION

Your operation's reputation: Reputation has always mattered, but it's even more prevalent in the age of online reviews and referrals. It's more important than ever to be known as an operation that can be trusted to deliver one-and-done treatment, especially for more sensitive accounts and sites that require more pre-treatment planning such as schools or public housing.

Why IGRs are Flea Control MVPs

Insect Growth Regulators (IGRs) are the solution to reducing flea control callbacks. They are a PMP's best tool for long-lasting control in the fight against fleas. Essentially, an IGR inhibits the life cycle of an insect, preventing them from maturing into breeding, biting adults.

IGRs also offer versatility in usage and can be applied both indoors and outdoors. From single homes to large schools, IGRs can provide flea coverage that meets your customers' unique needs. IGRs also penetrate and migrate deep into flea hot spots like the base of carpet fibers and between furniture cushions.

Most importantly, IGRs deliver long-lasting control against future flea infestations, which can help PMPs reduce callbacks and avoid repeat visits.

THE PRECOR® PRODUCT FAMILY HAS FLEA CONTROL COVERED



For pest control operators looking for versatile flea control, look no further than the Precor® product family. This product lineup packs a powerful punch that leaves PMPs and customers feeling reassured that the job was done right. Precor® products feature up to seven months of control against future flea infestations. Made by Zoëcon, the innovators of IGR technology, Precor® products provide control with minimal impact on non-target species.

Precor® IGR Concentrate is a residual flea control that prevents flea eggs and larvae from developing into adults. This product can also be mixed with an adulticide for effective flea control. It can be applied without disrupting household activities.



provides
larvae
adult fleas.
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Precor® 2625 Premise Spray is a broad-spectrum aerosol insecticide that utilizes multiple modes of action for quick, effective knockdown. In addition to the active ingredient (S)-methoprene, Precor® 2625 also features three adulticides and can treat up to 2,625 square feet to provide more than 200 days of flea protection.

*Learn more about the
ingredient that helps
experts make every PMP's
time more valuable here.*



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**A multi-pronged indoor/
outdoor approach with a built-
in follow up keeps fleas at bay.**

At Your **SERVICE**

The “rule of twos” is essential to keeping fleas under wraps at Environmental Pest Control. “After we do a service, we say, ‘Wait two days, and then vacuum every two days for two weeks.’ That is very effective,” said Chad Highley, an associated certified entomologist (A.C.E.) and president of the Lawton, Okla.-based firm.

Vacuuming is part of the treatment protocol for 65 percent of respondents to PCT’s annual State of the Flea Control Market survey.

Doug Foster provides a short list to clients of ways to prepare for the initial treatment that includes vacuuming,

along with picking up toys and other small items on the floor where technicians will treat.

“If we get there and they just haven’t done it, we’ll do the vacuuming and we build that into the price,” said the president of Burt’s Termite & Pest Control, Columbus, Ind. He plans on spending up to three hours on the initial service, which is more than most respondents to the survey. Most spend between 30 minutes and 2 hours on service.

Also important to controlling fleas is the use of insect growth regulators (IGR) and combining indoor and outdoor treatments.

Foster used to only treat for fleas inside structures. “About four years ago, we started adding exterior yard treatments — mainly shaded areas like underneath decks, by sheds, around dog houses,” he said. “Since adding that, the efficacy has really improved and so has profitability.”

The financial benefit stems from fewer callbacks. (See Curbing Callbacks on page 10.)

Also, part of the protocol is automatically scheduling a follow-up visit after the initial inspection and service, Foster said. After two weeks, a technician returns to the property. “So, we can tell clients, ‘Be patient. We’ll be back in two

weeks to do this again.”

Follow-up inspections are integrated into the flea service for 32 percent of survey respondents. Highley takes this approach, as well, returning to a property within 10 days of the initial treatment. “It’s just built into the program,” he said.

Camille Landry spends time discussing the flea issue with clients, even before performing the inspection. “We want to really understand what is going on,” she said. Landry, A.C.E., is president of Full-Scope Pest Control near Houston. “We ask, ‘When did you start noticing fleas? Do you have pets? Did you just move in?’ We try to get all of this information — and we highly recommend treating the interior and exterior at the same time.” FullScope leans toward an adulticide on the interior with an IGR. Outside, technicians apply granules along with an adulticide as a soil penetrate. “And a lot of it is about setting customer expectations,” Landry said. “When we describe the life cycle, most are like, ‘I had no clue.’ We let them know they are seeing 5 percent of the potential fleas — it’s important to work with us. This sets the groundwork.”

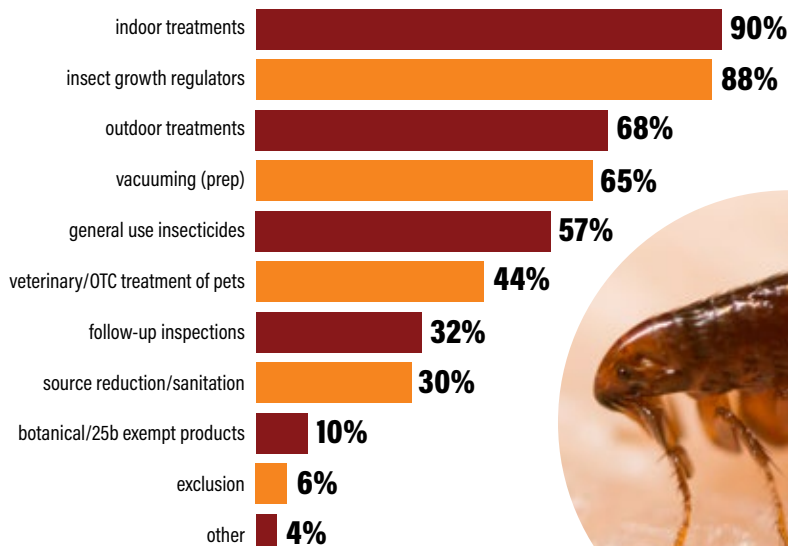
With client education comes a conversation about remedial flea control for pets, said Dennis Mastrolia, president, Dennis the Mennis Pest Elimination Experts, Lynn, Mass. Vets can suggest products that contain active ingredients such as fipronil, (s)-methoprene and pyriproxyfen.

“We talk to clients about making sure the pet sees a veterinarian to be properly treated for fleas — that’s an integral part of the success of the service,” Mastrolia said.

And as for preventing wildlife from introducing fleas to a home, Landry often adds control and exclusion efforts to a program, addressing the root of the issue. Identifying these entry points requires careful technician education and communication from field to office, she said. 🐾

What You Do to Control Fleas

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

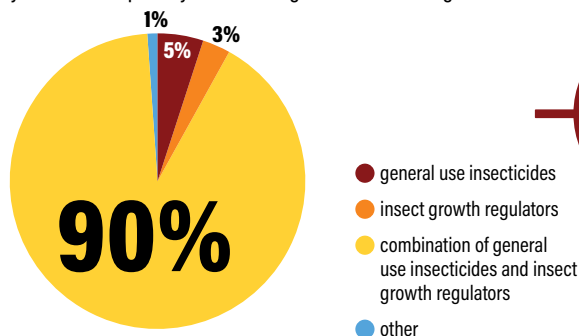


Source: Readex Research; Respondents: 202; Respondents could select multiple answers

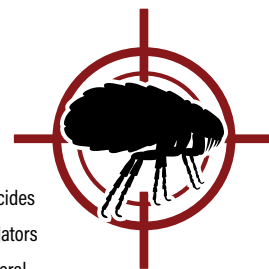


Go-To Treatment Regimen

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

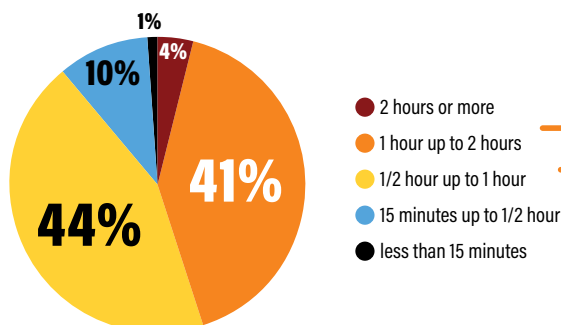


Source: Readex Research; Respondents: 202



Time-Intensive Work

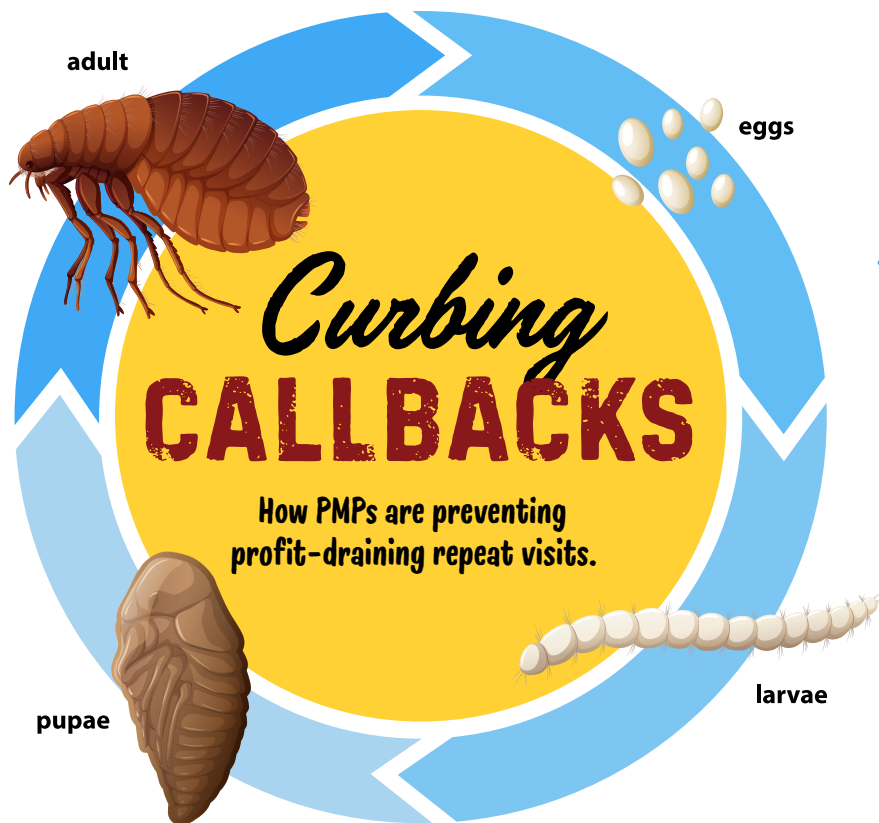
How much time does your location spend on a typical residential flea control service job?



Source: Readex Research; Respondents: 202



1.1 hours on average



We charge accordingly. Sometimes we need to go out first to make an inspection and we schedule a service, and then a follow-up. We make the same profit margin as we would for roaches, rodents and other miscellaneous pest problems we deal with."

-Dennis Mastrolia, owner, Dennis the Mennis Pest Elimination Experts

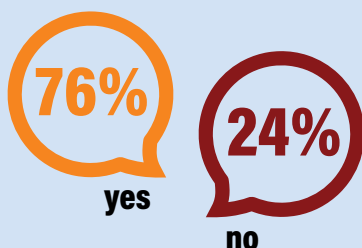
Scheduling an automatic follow-up with every flea service has been key to curbing callbacks at Burt's Termite & Pest Control in Columbus, Ind. "We found that the majority of people were calling us because of the nature of the life cycle," said Doug Foster, president. "They go from egg to larvae to pupae and then adult, and during that pupae stage, no amount of pesticide is going to kill those. So, even after two weeks, those are emerging. People were getting bites even though there was product out.

"During that window, they can still get a bloodmeal and customers think, 'We still have them!'" The follow-up step knocked out most callbacks.

Also important is servicing the entire house and exterior, not just where the homeowner thinks fleas are festering, said Dennis Mastrolia, president, Dennis the Mennis Pest Elimination Experts, Lynn, Mass. "They may say, 'We only have fleas downstairs in the living room,' and they don't bother with upstairs. But meanwhile, the pet has the run of the house. It's important to educate the client." 🐾

Service Pledge

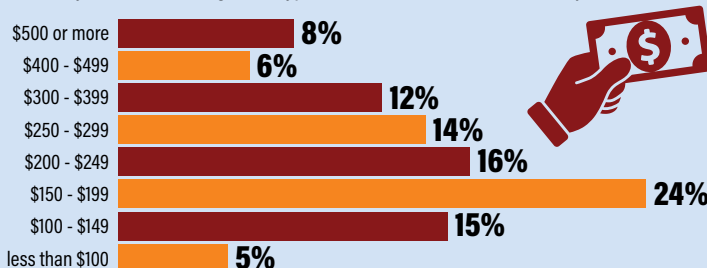
Does your location provide any sort of guarantee for its flea control services?



Source: Readex Research; Respondents: 202

What Customers Pay

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



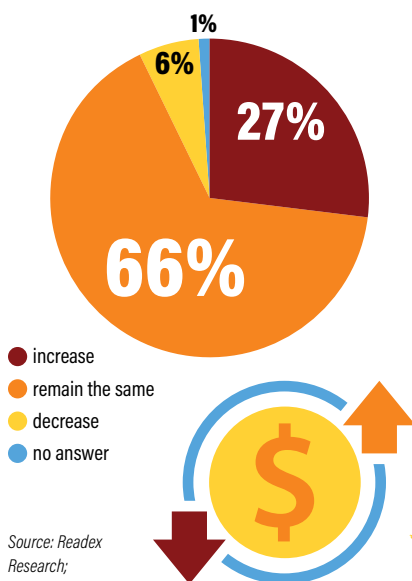
Source: Readex Research; Respondents: 202



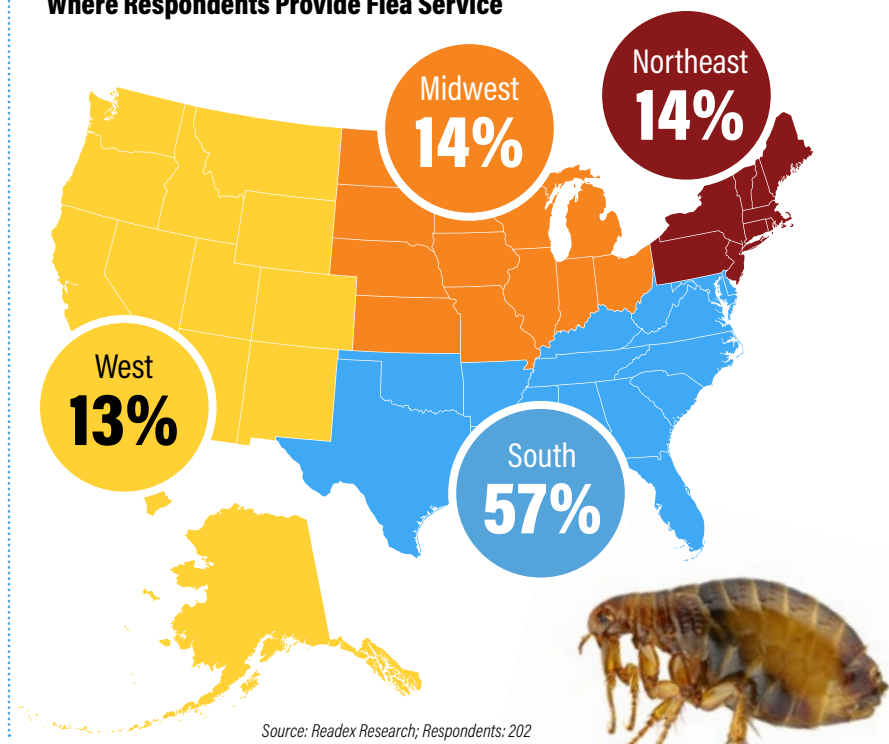
BY THE NUMBERS

Sound Expectations for 2023

Compared with 2022, do you anticipate the percentage of your location's revenue generated from its flea control services to increase, decrease or remain the same in 2023?

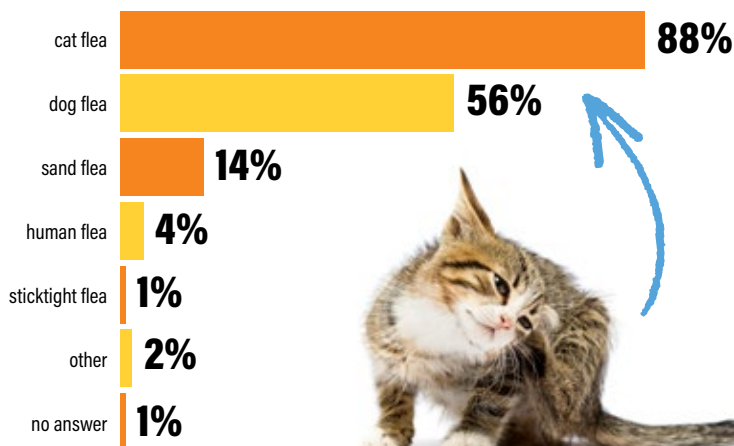


Where Respondents Provide Flea Service



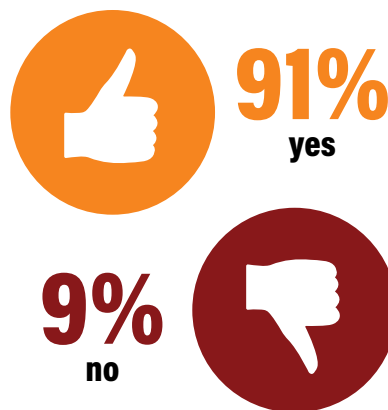
The Usual Suspects

What flea species are common in your market area?



9 Out of 10 Offer

Does your company location offer flea control services?





DING DONG THE ITCH IS DEAD.

CONTROL FLEAS CONFIDENTLY BY PREVENTING FUTURE POPULATIONS WITH THE IGR IN PRECOR® PRODUCTS.



COMPARISON CHART	(S)-METHOPRENE (PRECOR®)	PYRIPROXYFEN
• The original/first insect growth regulator (IGR)	✓	
• 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	✓	✓
• Low odor and non-repellent	✓	✓



A LEGACY OF CONTROL.



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