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SEIZE the Fleas!

Thanks to favorable weather conditions and the growing popularity of pets, PMPs are seeing a modest resurgence in the flea market.

The summer of 2019 is another strong one for flea infestations, as two of fleas' favorite conditions, heat and humidity, prevail across most of the United States.

PMPs report steady flea pressure, with 75 percent telling PCT through our latest State of the Flea Market survey that infestations have increased or remained about the same over the past year in their markets.

92% offer flea
control
services
of PMPs

Source: Readex Research;
Number of respondents:
187



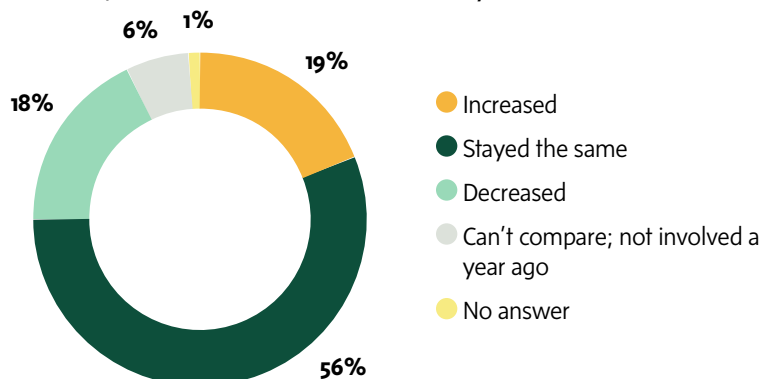
“We’re getting a late start here in Wisconsin because we’ve had a chilly spring, but once it heats up and people’s dogs and cats start spending more time outside, they’ll be carrying fleas and ticks into the house,” says Scott Elsner of Bay Pest Solutions. “Many times, they pick up fleas from rabbits as they chase them, or when they roll in piles where wild animals have died.”

Scott Dinger of Primal Pest Control says that fleas are a relative newcomer to northern Idaho, but these tiny, wingless, bloodsucking ectoparasites are unfortunately beginning to adapt to the region’s arid climate. “Our population is booming, and the people coming in are creating microclimates where fleas can thrive. Momentum has been building for the past three years, and now, a lot of local PMPs tell me they’re getting flea calls all the time. There was also an instance of flea-borne plague in the southern part of the state last summer — the first case in Idaho in more than two decades.”

While plague, murine typhus and other flea-borne diseases are certainly of concern, it’s the everyday nuisance of fleas’ invasions and itchy bites that generally prompt calls for service. PMPs across the nation are responding. In fact, nearly all (92 percent) of the PMPs who participated in our survey said they provide flea management services, primarily for cat and dog fleas. ■

Flea Infestations: Past Year

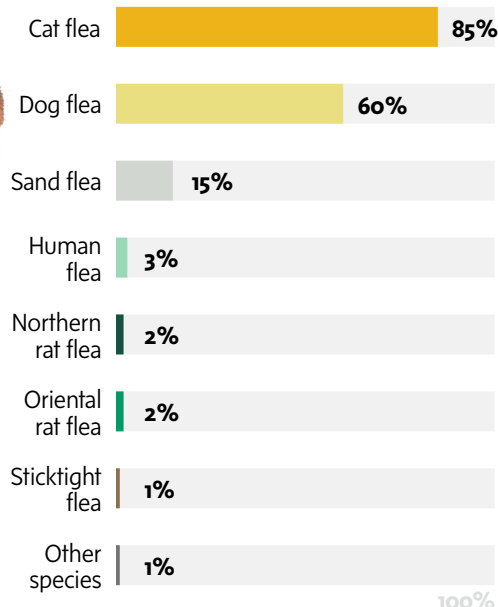
Over the past year, do you feel the incidence of flea infestations has increased, decreased or remained the same in your market area?



Source: Readex Research; Number of respondents: 172

Common Flea Species

What flea species are common in your market area?



Source: Readex Research; Number of respondents: 172;
Respondents could select more than one answer

ABOUT THIS SURVEY

The survey sample for the State of the Flea Market Report was randomly selected from PCT’s e-mail list of PMP owners/operators, executives, partners and presidents. The survey was conducted by Readex Research, a third-party research firm, from March 13-25, 2019, with 187 total responses — a 4 percent response rate. Fifteen respondents were eliminated because they indicated they did not offer flea control services. The margin of error for percentages based on the 172 respondents who indicated their company location offers flea control services is plus or minus 7.4 percent at the 95 percent confidence level. Results may not add up to 100 percent in some charts published in this market report due to rounding.



FLEA

WORK

by the
Numbers

PCT readers share their financial expectations
for the flea market in 2019.

With flea revenues averaging about 4 percent of companies' overall revenues, many PMPs look for continuing growth. Eighty percent say that their flea work has either grown or remained steady as a percentage of their total revenues over the past three years, while only 15 percent note a decline. They're optimistic about 2019, too, with 96 percent expecting higher or even revenues and only 3 percent expecting a decrease.

Most pest management professionals — 80 percent — market flea services separately, while the remaining 20 percent offer them as part of general pest services. Scott Elsner of Bay Pest Solutions speaks for many of his peers

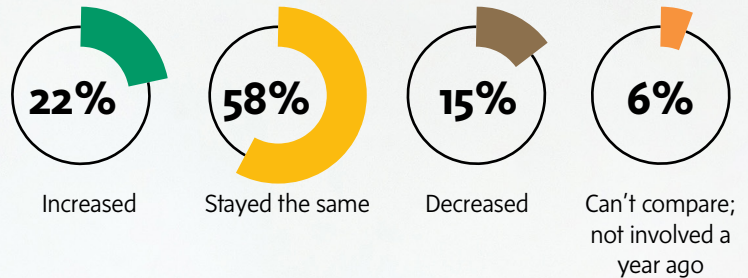
in saying, "Fleas are active for such a short period of time and affect such a small percentage of our customers that it doesn't make sense for us to work these services into our general pest plans."

However, established general pest customers — particularly those with pets — are great prospects for flea work. "They figure if you can solve their general pest issues, you can solve their flea issues," says Tracy Rice of Rice Pest Control in Anniston, Ala.

What's the going rate for residential flea services? The median price for a job is \$195. And technicians are spending an hour getting the job done. ■

Flea Revenue Percentage: Past 3 Years

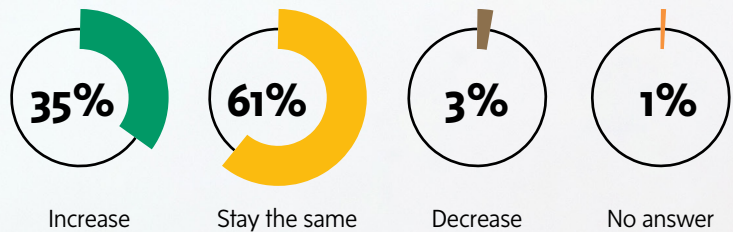
In the past three years, has the percentage of your location's revenue generated from its flea control services increased, decreased or remained the same?



Source: Readex Research; Number of respondents: 172

Flea Revenue Percentage: 2019 Expectations

Compared with 2018, do you anticipate the percentage of your location's revenue generated from its flea control services to increase, decrease or remain the same in 2019?



Source: Readex Research; Number of respondents: 172

Price Tag for Flea Service

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

\$300 or more	15%
\$250-\$299	20%
\$200-\$249	12%
\$150-\$199	27%
\$100-\$149	18%
Less than \$100	8%

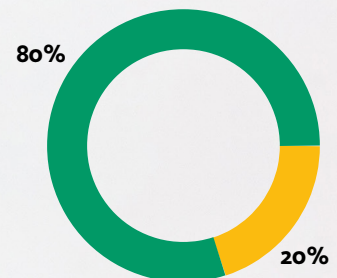
**MEDIAN PRICE =
\$195 PER JOB**

Source: Readex Research; Number of respondents: 169 (those who provide residential flea control)

How Flea Control Services Are Packaged

Does your location offer flea control services as part of its general pest control service or as a separate service?

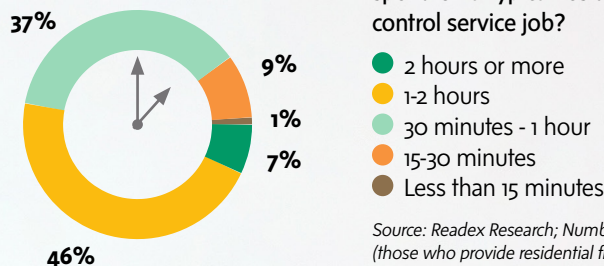
- As a separate service
- As part of general pest control services



Source: Readex Research; Number of respondents: 172

Length of Service Call

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



Source: Readex Research; Number of respondents: 169 (those who provide residential flea control)

MEDIAN LENGTH OF TIME = 1 HOUR

FOCUS ON

FLEAS

SECONDARY SITES TO CONSIDER FOR TREATMENT



Fleas are a pain for animals and humans alike. For pets, fleas can cause scratching and fur loss, tapeworm, bites that lead to anemia and even trips to the vet. And for us humans, fleas can be a nuisance from their irritating bites and disrupting the home.

Female fleas can lay up to 20-30 eggs per day and are able to live up to 100 days. With populations that can quickly explode, pre-adult fleas make up 95% of the total flea population. Eggs are laid on animal hosts and eventually fall off to the ground where they will stay until it's time to hatch. Eggs hatch and larvae develop in the nap of carpet, furniture, pet bedding and even the cracks in hardwood floors, feeding on flea dirt (dried blood, feces from adult fleas, and organic matter). When they emerge, fleas wait until a host passes by and then jump from host to host, taking blood meals to survive and to lay eggs.

It's easy to blame our furry friends for flea infestations, but fleas aren't just found in animal bedding sites. Warm summer months mean people and their pets are out and about— with fleas tagging along. When treating for fleas this summer, consider these potential hot spots that may require treatments:



Critter Hideaways



Sometimes homes that don't even have pets can have flea sightings. Rodent control and wildlife exclusion can leave emerging fleas without a proper home and host. So when seeking a host, fleas can migrate into living spaces when they sense movement and potential hosts. To avoid this, encourage clients to thoroughly inspect potential critter hideaways like wall voids, crawl spaces, and attics for signs of rodent activity.

Thrift Stores/Garage Sales



They don't call it a flea market for nothing. Used furniture from flea-infested homes can potentially harbor flea pupae and other pests. Educate your clients on the importance of inspecting any items purchased from a garage sale or second-hand store to prevent any unwanted guests in their home and consider treating these used items prior to introduction into a home.

Parks



Spending time at a park is an ideal summer's day, and fleas think so too. Letting your pets wander off on paths where they can explore exposes them to emerging fleas looking for a host. Tell clients to stick to open areas and paths when visiting parks with their pets. Pets can transfer fleas, so remind clients to also be mindful about interacting with other pets at the park.

Pet Hangouts



To gauge any potential flea hot spots, ask your clients some of these important questions: Do pets nap in areas that are out of sight? Have your cats figured out how to get in a mattress box spring or even the family room couch? Does the family cat like to lounge on top of the refrigerator or kitchen cabinets? Does the dog like to sneak into the linen closet for naps? Pet owners aren't usually thinking about these hangout spots, but these sites would all require inspection and treatment for prompt control of flea infestations.

To accommodate an array of application sites and treatment preferences, Zoëcon has developed the comprehensive Precor® product line. The Precor® line is formulated with the insect growth regulator (S)-methoprene that effectively breaks the flea life cycle and prevents future populations by providing long-term residual control in both aerosol and liquid formats. Precor® 2625 Premise Spray aerosol adds the powerful insecticide etofenprox to knock down adult fleas and offers broad spectrum control of other listed insects and treats 2,625 square feet. Precor® IGR Concentrate is an ideal tank-mix partner that provides up to seven months of adult flea emergence control. In addition, the Precor® line offers a total release fogger for larger area treatments and Petcor® for treating and preventing flea and tick infestations on dogs and cats.

To learn more, visit Zoecon.com.



Gaining and Maintaining Control: It Takes a Trio

A variety of control techniques are used to control fleas in residential settings.

A combination of general-use insecticides and insect growth regulators (IGRs) is far and away the most popular treatment regimen among PMPs surveyed, with 85 percent saying they rely on this powerful one-two punch. “Fleas can be challenging to control because they go through a complete metamorphosis. The key is treating each of their four stages — eggs, larvae, pupae and adults,” says Jeffery Preece of ZipZap Termite & Pest Control in Kansas City, Mo. “We knock the adult populations down with the adulticide and then rely on the IGR to break the life cycle.”

Other measures — outdoor treatments and follow-up inspections, for example — are often incorporated into flea control programs as well. But PMPs can’t do it alone: Most agree that they need the involvement of customers and their pets’ vets to ensure effective flea management.

“We engage customers by asking them to vacuum, wash and dry pet bedding and remove clutter before we go in to treat, which makes both interior and exterior treatments more effective,” says Tracy Rice of Rice Pest Control. “We also recommend that they keep their grass cut short, dethatch the lawn and stay alert for animals that might be roaming the property or even bedding under the porch.”

In addition to requesting preparatory vacuuming, Alan Bliss of Flynn Pest Control in Rehoboth, Mass., makes sure his technicians instruct homeowners to

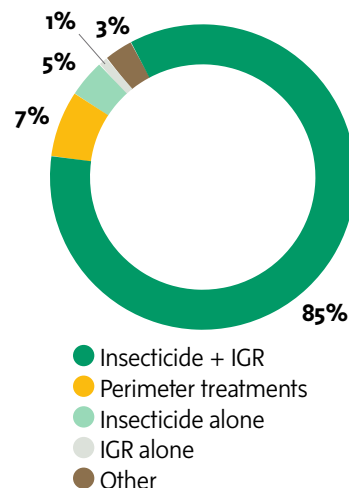
vacuum a day or two after the treatment and then every four to five days to pick up any dead fleas, emptying the bag each time. Sanitation is, of course, vital to any pest control program.

But with fleas, there’s also one more very important element: getting any family pets onto a treatment program. While pets aren’t a prerequisite for flea infestations, most flea service customers do have pets, which serve as hosts for, and carriers of, the pests. While pet owners can buy flea and tick products for their animals over the counter, pest management professionals usually recommend a trip to the veterinarian.

“We tell our customers to take their pet to the vet on the same day we treat their house,” says Scott Elsner of Bay Pest Solutions. “Otherwise, they risk having fleas jump back onto the pet, and reinfestation can become an issue.” ■

Primary Flea Treatment Regimen

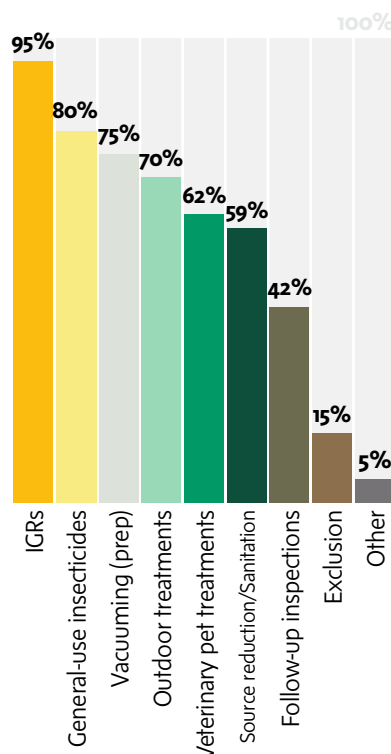
What is your location's primary treatment regimen for controlling fleas?



Source: Readex Research; Number of respondents: 172 (those who provide residential flea control)

Service Protocols Included by PMPs

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



Source: Readex Research; Number of respondents: 172; Respondents could select more than one answer

How PMPs Are Minimizing Callbacks

Callbacks are costly. Here's how to prevent them.

The callback rate for fleas isn't much different from that of general pests; it hovers around 4 to 6 percent, according to our 2019 survey. That's why 73 percent of pest management professionals are comfortable offering a guarantee on their services.

Everyone has their own terms — zero fleas for 60 days after two treatments, three months of protection after whatever treatment protocol is deemed appropriate by the PMP, or even six months of coverage following a treatment plus follow-up.

There are a variety of approaches to treating flea infestations, too. Here are some of the tactics PMPs are using to keep their callback numbers low.

PCT asked survey participants how often they treat specific areas of a home in their quest for flea control. Most are sure to treat pet bedding, under feet of furniture and gaps in the floor, and there are a host of other places — bases of cabinets, inside furniture, drapery and wall hangings — that they treat at least some of the time.

"It's important to start by asking the customer questions about their pet's habits and behaviors, and what's happening in the home," says

Jeffery Preece of ZipZap Termite & Pest Control. "Where does your dog spend most of his time? Where does he sleep? Does your dog ever sit in your lap? On which piece of furniture? Have you been bitten? Where are you when you get bitten — in this chair, in your bed? Once

you're informed, you have a better idea of where you need to focus your efforts."

Tracy Rice of Rice Pest Control shares his approach: "We go in and flip the furniture so we can treat the floors underneath, and we use an IGR and pesticide around the perimeter of the room. We don't generally treat open areas, other than maybe a very light desiccant application on carpeted

73%

offer a guarantee

How Often Do You Treat These Areas?

	Always	At Least Sometimes	Never
Pet bedding	72%	87%	12%
Under feet of furniture	65%	85%	10%
Gaps in floor	63%	90%	8%
Bases of cabinets	51%	77%	18%
Inside furniture	48%	87%	8%
Drapery	36%	73%	17%
Wall hangings	13%	37%	45%
Indicated at least one	88%	96%	52%

Source: Readex Research; Number of respondents: 172



floors. As long as customers have vacuumed prior to our call, we can usually get effective control with no callbacks.”

Don't forget the great outdoors. Alan Bliss says that while his team at Flynn Pest Control has for years relied on indoor applications

4-6%
the average call-back rate for fleas

of adulticides and IGRs as their first line of defense against fleas, in recent years they've found more of a need for outdoor

applications. “Our callback rate for flea accounts started inching up, so we started doing more outdoor perimeter treatments. We couldn't identify exactly why they were becoming more difficult to control — maybe some resistance — but the outdoor treatments have increased our success in these accounts,” he says.

Preece believes outdoor treatments are vital. “We tell customers to get their pet on a flea and tick program, and then we treat both indoors and outdoors,” he says. “If you omit any of these three, you can have issues getting control.”

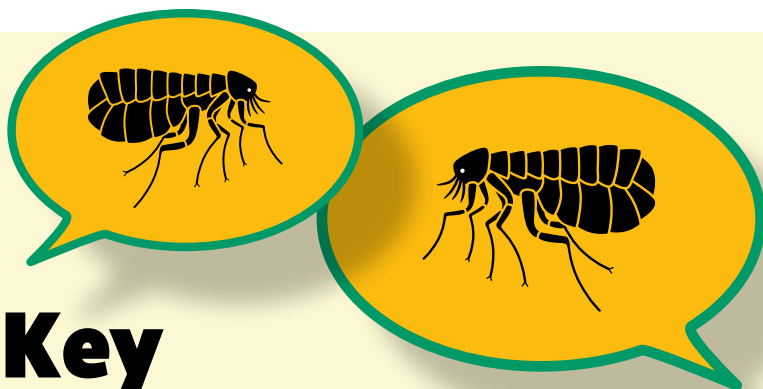
Where should you treat outdoors? The Mallis Handbook of Pest Control recommends the following: “Outdoors, treat only shaded areas where animals spend the most time. Crawlspace, under porches and decks, and outbuildings are likely sites to target.”

Respect resistance. While only 18 percent of PMPs say that flea resistance is a problem in their markets, 52 percent practice resistance management. Why take chances?

“We are on a constant rotation with flea treatments,” says Rice. “We track the products we've used through our database and pull up a report before we service a home we've treated in the past. We see which products we used last time and then switch to something different for the new treatment.”

Primal Pest Control's Scott Dinger says he rotates products because has seen a greater incidence of resistance across most insect species in the northern Idaho market.

“The only way you can stay ahead of resistance is to keep throwing curveballs,” he says. “I use different pesticides each time I treat a home.” ■



Key Communication Techniques

Tips for educating customers about the flea control process.

Companies that are successful in engaging customers in the flea control process tend to do quite a bit of education. In fact, three-quarters of survey respondents told us they leave information — in particular, post-treatment instructions — with customers so they can work toward maintaining their flea-free status. Many also explain how the flea control process works as they're talking with customers prior to the service call, or they send them a prep sheet with pre-treatment instructions.

What information are they sharing with customers? Primarily the importance of:

- Acting promptly, as fleas can be vectors of disease and multiply quickly
- Washing pet bedding and toys in hot, soapy water
- Vacuuming carpets and furniture before and after treatments
- Keeping pets on an effective flea and tick program
- Being aware of rabbits, rodents, feral cats and other stray animals on their property, and excluding them when possible
- Not using over-the-counter flea control products, such as flea bombs
- Being patient, as the treatment will take time to work (you can't wipe out four stages of bugs overnight!)

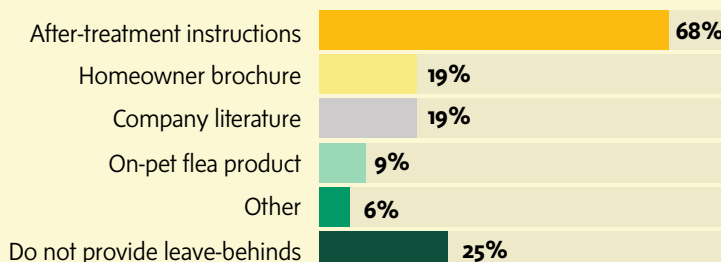
Jeffery Preece of ZipZap Termite & Pest Control says that his son, Geoffrey Preece, shares a lot of helpful information with established and prospective customers through social media. “He offers tips — reminding pet owners to get their dogs and cats on a flea and tick program, for example — as a public service,” says Jeffery. “When you offer helpful information, people follow you. These informational campaigns have been very beneficial to our business.”

About 72 percent of survey respondents said they feature flea control services in their marketing materials, highlighting aspects including their companies' certified technicians, service guarantee, excellent control and free inspections. ■

Leave-Behinds Provided to Customers

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

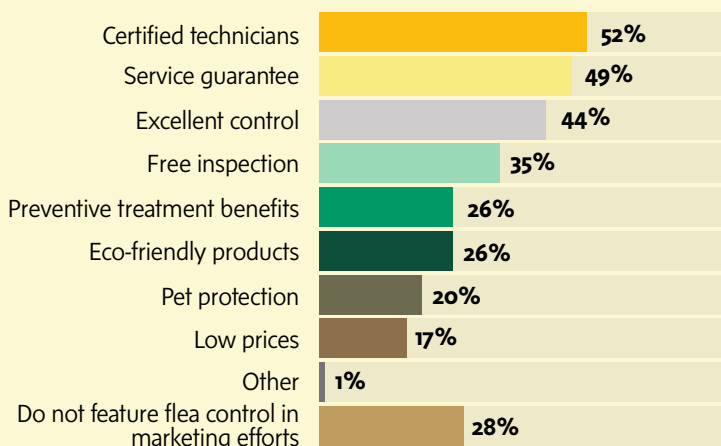
Source: Readex Research; Number of respondents: 172; Respondents could select more than one answer



Aspects of Flea Control Services Featured in Marketing

What aspects of your location's flea control services do you feature in your marketing efforts?

Source: Readex Research; Number of respondents: 172; Respondents could select more than one answer



Bombs Away! We Asked PMPs...Do Customers Try DIY Flea Treatments First?

We all know the risks associated with over-the-counter products — flea bombs in particular — but do customers? The frightening response is NO, according to 84 percent of PMPs we asked. They estimate that 57 percent of the customers who call them for flea control have already tried to resolve the issue themselves.

This inspired us to ask a few PMPs about their experiences. They shared some interesting insights.

WHEN CUSTOMERS CALL YOU FOR FLEA CONTROL SERVICES, HAVE THEY ALREADY TRIED DO-IT-YOURSELF TREATMENTS?

"Yes, and it can make our job harder, because bombs just send the fleas deeper into the carpet. They don't kill eggs or larvae either, so by the time they call us, the infestation is usually pretty bad."

— **Scott Elsner, Bay Pest Solutions**

"A lot of them do. They buy products they see on the internet and then apply them, but they don't always follow the instructions. So a lot of our service calls start with us cleaning up — vacuuming dust usually. Once I had to refer the customer to a cleaning service before we could start. They had the carpet steam-cleaned and then we were able to do the treatment."

— **Tracy Rice, Rice Pest Control**

"Yes — 100 percent of the time! They read articles on the internet, then go out and buy five or 10 flea bombs, which is the worst thing they can do. They spray products they shouldn't, they use too much dust — I once went on a call where the homeowner had put 50 pounds of diatomaceous earth throughout the house. It covered the carpet. But they had read it was safe and didn't consider the inhalation risk of all that dust. This is why it's so important to educate customers. Once we explain what works and why, they can collaborate with us in resolving their issue."

— **Jeffery Preece, ZipZap Termite & Pest Control**

84% of PMPs say customers don't understand the risks associated with flea bombs





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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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