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# *State of the* **FLEA MARKET**

» Inside:

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- The Future of Flea Control
- Most Popular Service Protocols
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# FLEA Forecast

**With the coming of summer, flea season peaks. Are you and your technicians prepared for the inevitable onslaught of service calls from consumers as flea pressure grows?**

**W**hat impact will the predicted increase in mosquito, tick and flea activity this year have on pest professionals offering flea control services to consumers?

For 96 percent of the pest management professionals responding to the PCT 2018 State of the Flea Market Survey, the hope is that they will be able to ply their craft often this summer and provide relief to homeowners and their pets.

The need for flea control services traditionally peaks during the warm summer months when increased temperatures and humidity levels — conditions fleas thrive in — contribute to increased flea pressure. Summer is also the time humans and their pets get outdoors more frequently, increasing the chances of an encounter with fleas.

But based on the survey's findings, pest professionals expect more of the same when it comes to encountering incidences of flea infestations. Fifty-six percent of those surveyed feel the presence of fleas will remain the same in 2018; up five percent from 2017.

Darren Van Steenwyk, B.C.E., technical director for Clark Pest Control in Lodi, Calif., echoes what his peers across the country are seeing with the level of flea control work. "The feeling is our flea control work is at about the same level as it was last year," says Van Steenwyk. "We are seeing consistent calls but there aren't big swings up or down."

In California, flea season is strongest in the warm summer months and usually peaks in August but activity was reported

as early as February in Southern California this year, according to Van Steenwyk.

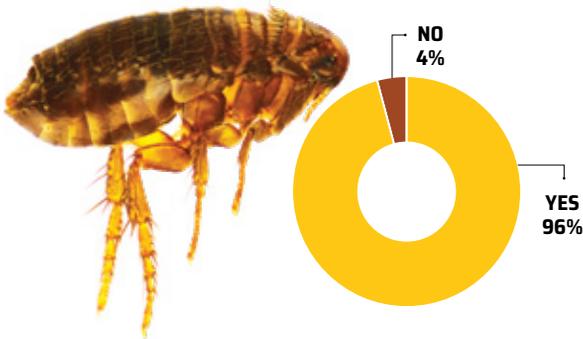
How will the anticipated status quo impact revenues? According to the survey, only 15 percent of PMPs indicated they generated \$10,000 or more annually from flea control work. The majority — 53 percent — said they took in between \$1,000 and \$9,999 annually.

As a percentage of revenues, flea control services made up 4.2 percent (mean) of respondents overall service revenues. How does this stack up to other pests? Rodent services make up 15.6 percent and termites 25 percent, respectively.

What are pest professionals charging for a typical residential flea job? According to the survey, the average mean charge was \$210 — down \$4 from 2017. 🐾

## VIRTUALLY ALL PMPs OFFER FLEA SERVICES...

Does your company location offer flea control services?



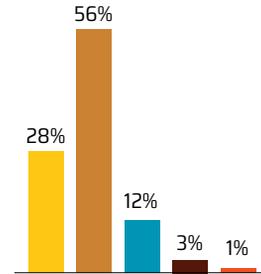
(Source: Readex Research; Number of respondents: 228)

## ...WITH A QUARTER REPORTING AN INCREASE IN INFESTATIONS THIS 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?

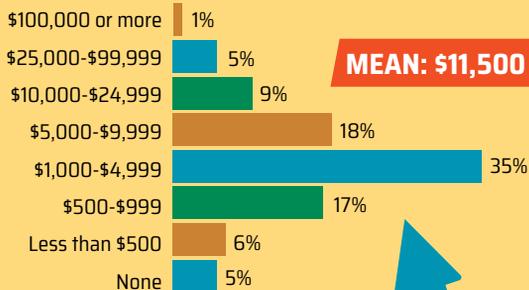
- Increased
- Remained the same
- Decreased
- Cannot compare; Not involved a year ago
- No answer

(Source: Readex Research; Number of respondents: 218)



## FLEA CONTROL SERVICE REVENUES

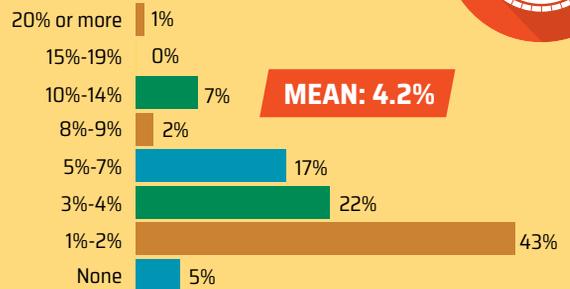
How much total revenue did your location generate in 2017 from all flea control services?



(Source: Readex Research; Number of respondents: 218)

## FLEA CONTROL SERVICES AS A PERCENTAGE OF OVERALL REVENUE

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



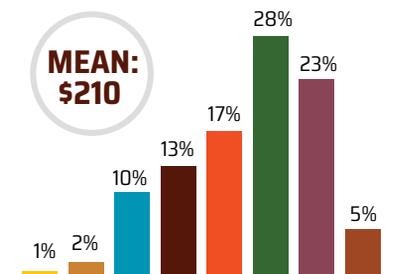
(Source: Readex Research; Number of respondents: 218)

## TYPICAL RESIDENTIAL SERVICE TOPS \$200

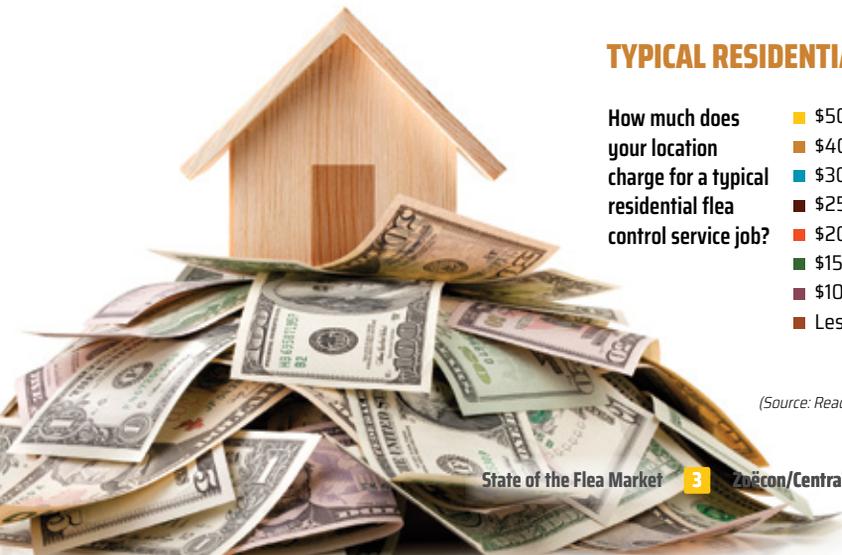
How much does your location charge for a typical residential flea control service job?

- \$500 or more
- \$400-\$499
- \$300-\$399
- \$250-\$299
- \$200-\$249
- \$150-\$199
- \$100-\$149
- Less than \$100

**MEAN: \$210**



(Source: Readex Research; Number of respondents: 218)





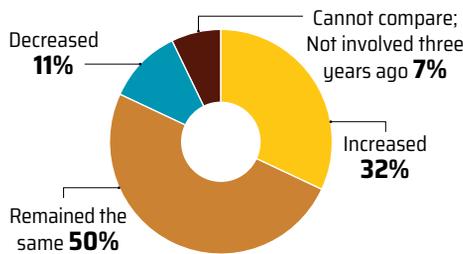
# GROWTH PATTERNS

In examining growth patterns for flea control services, 32 percent of those responding indicated they had seen an increase in revenue related to flea control over the last three years. This was up three percentage points from last year's survey.

And even though experts call for increased flea and tick pressure this season, pest professionals were blasé about the prospects for increasing revenues this year. Fifty-nine percent feel revenues will remain the same for flea control services. 🐜

## NEARLY A THIRD OF PMPs REPORT REVENUE GROWTH

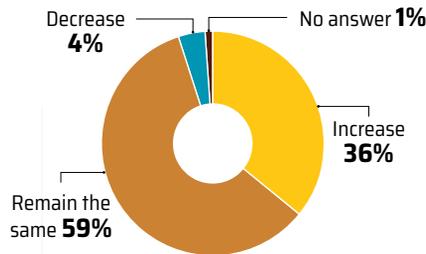
In the past three years, has the percentage of your location's revenue generated from its flea control services increased, decreased or remained the same?



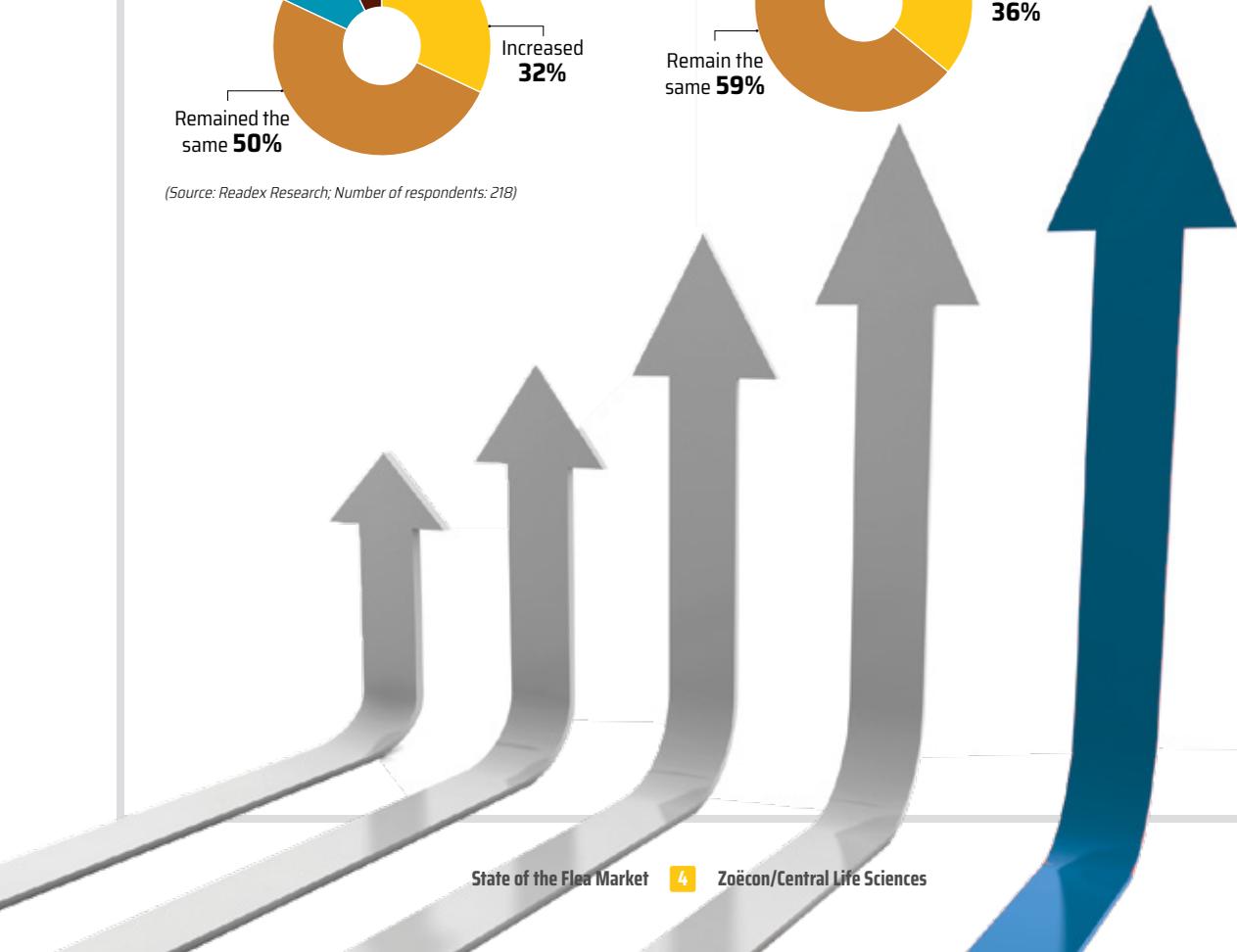
(Source: Readex Research; Number of respondents: 218)

## PMPs EXPECT CONTINUED GROWTH IN 2018

Compared, with 2017, do you anticipate the percentage of your location's revenue generated from its flea control services to increase, decrease or remain the same?



(Source: Readex Research; Number of respondents: 218)





# THE FUTURE OF FLEA CONTROL

WITH FLEA CONTROL SERVICES HOLDING THEIR own, we wondered what the future looks like for this segment of the market. Will there be growth for pest professionals? Is there new technology on the horizon that will change the way treatments are performed? What is the role of the pet owner in protecting their four-legged companions? There's no shortage of questions when it comes to the flea market.

## THE GROWTH QUESTION

If previous years are an indicator the flea control market will not see any wild swings but remain a consistent source of revenue. A study from the U.S. National Institutes of Health's National Library of Medicine revealed that 44 percent of dog owners in the United States had direct experience with fleas — a good sign for PMPs that their talents could be called upon.

What could tilt the revenue scale in the favor of the pest industry? One area could be if pet owners balk at taking their dog or cat to the vet as often as they should or if they don't follow the prescribed on-animal control recommendations as some research has shown.

Clark Pest Control's Darren Van Steenwyk says he has anecdotally noticed pet owners in California being inconsistent in their vet visits and that could lead to more serious flea infestations that require the services of a pest management professional.

## NEW TECHNOLOGY

Much like the mosquito market, new products, particularly pesticides, for flea control are far fewer in number than in years past. The high cost of reregistration and small ROI for manufacturers make new product introductions unlikely.

Dr. Nancy Hinkle of the University of Georgia foresees an increased emphasis on flea programs that are designed and deployed using integrated pest management (IPM) practices. Educating pet owners on the value of preventive pet care, sanitation and exclusion will also play a larger role in flea control.

"Consumers are looking for less impactful control options and savvy pest professionals will tailor solutions that appeal to millennials and others who are willing to spend more on pet care," adds Hinkle.

## ROLE OF THE PET OWNER

As mentioned earlier, the role of the pet owner is critical in identifying flea issues and taking action to remediate the problem or prevent it in the first place. Whether that is a trip to the veterinarian or calling a pest professional to eliminate an infestation in and around their home, the ball is clearly in the court of the pet owner.

While research indicates pet owners might engage in preventive control more consistently if products had a longer retreatment interval, Clark Pest Control's Darren Van Steenwyk feels customers need to know that on-animal products are not the only preventive solutions [See Talking With Customers About Fleas sidebar].

"We will still find a way to gain control of the flea problem even if the customer does not follow an on-animal care program but it may take a few more visits to do it," says Van Steenwyk. 🐾

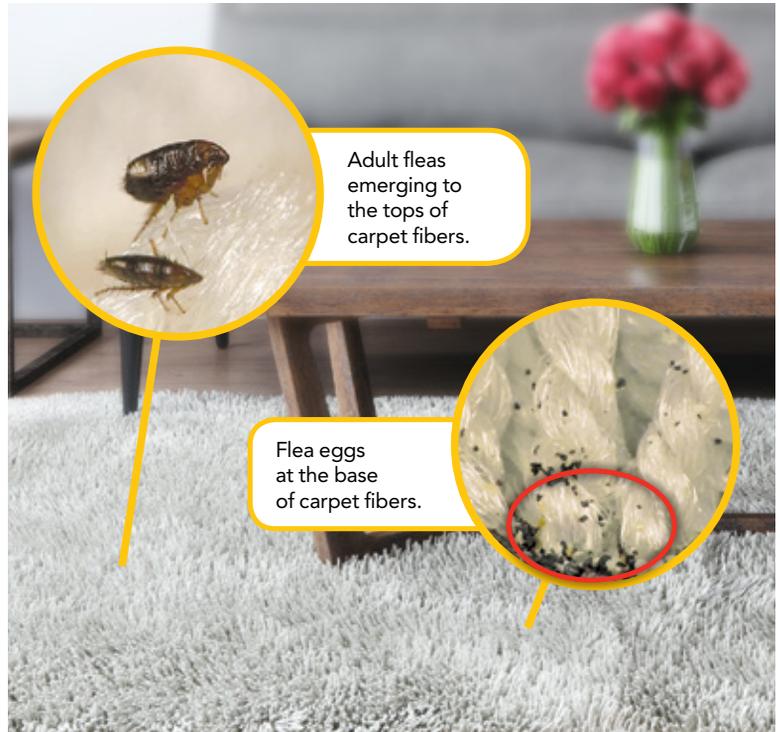


# TEAM UP ON FLEAS FOR EFFECTIVE CONTROL



Flea control is a challenge, and often homeowners attempt treatments before contacting a professional for help. According to the 2018 State of the Flea Market study, 66% of respondents estimate that at least half of customers try to solve their flea control problems themselves. Homeowners and PMPs need to work together for a successful flea treatment. Homeowners can rely on PMPs to recommend best management strategies and product solutions, such as those in the Precor® lineup from Zoëcon® Professional Products. Prior to application, PMPs must stress to customers the essential role that they play in properly preparing for a flea treatment.

Flea eggs hatch and larvae develop in carpet, furniture, pet bedding and even the cracks in hardwood floors. When the larvae pupate and emerge as adults, the life cycle continues, creating further frustrations for people and pets alike. It is critical that fleas are stopped in all four life cycle stages: egg, larva, pupa and adult.



Photos courtesy of Kansas State University.

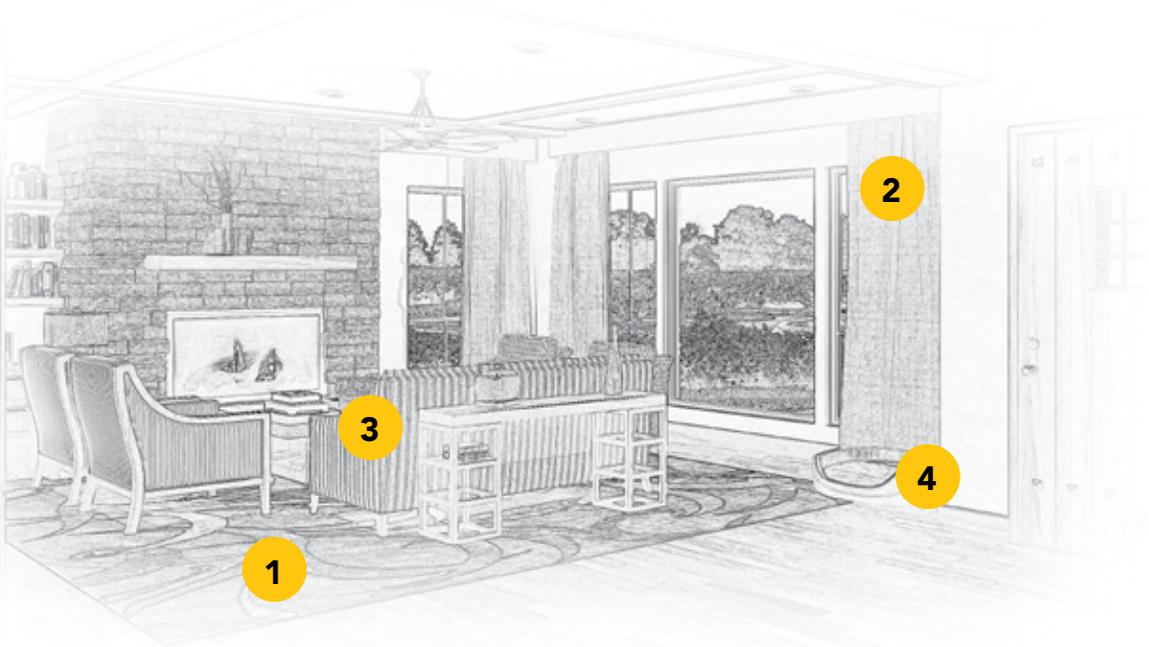
The Precor® family of products offers solutions in a variety of formulations to control fleas at all stages, helping to rid homes of the fleas you can see and those you can't for up to seven months. The IGR, (S)-methoprene, penetrates and migrates deep into places like the base of carpet fibers and between furniture cushions to prevent the immature fleas you don't see – 95% of a typical flea population – from maturing into breeding, biting adults.

But before a professional can begin treatment with Precor® products, there are specific steps that homeowners can take prior to the appointment.

Advise customers to remove loose items from floors, unplug lamps, vacuum all areas of the home and mop tile/wood floors. Additionally, urge customers to wash all pet bedding in hot water and thoroughly bathe pets.

Once the customer prep is completed, PMPs can step in with professional solutions. According to the 2018 State of the Flea Market study, combination products featuring an adulticide and IGR, such as Precor® 2625 Premise Spray, are favored by 61% of respondents. The Precor® product lineup features several additional unique formulations to offer flexible application options, including foggers, aerosols, sprays and concentrates.





## PRECOR® FLEA TREATMENT APPLICATION TIPS

### 1 FLOORS/CARPETS/HARDWOOD/TILE

Fleas don't develop on hardwood and tile, unless tile grout is missing or there are significant gaps in the wood. If hard surface floors are intact, treatment efforts should focus on:

- Baseboards
- Areas around and underneath the feet of furniture that rarely moves
- Larger, stationary items such as beds, pianos, dining room tables, etc.
- Areas where hard surface floors transition to carpet
- Tile strips, thresholds, etc.
- Sections of missing grout
- Cabinet bases

Fleas can typically be found where pets spend a lot of their time, so be sure to check under pet beds or near doors. Note that larvae and eggs seek protection in carpet fibers, under cushions and in cracks and crevices.

### 2 DRAPES AND WALL HANGINGS

- Inspect and treat crown molding, curtains and valances
- Inspect and treat behind picture frames

### 3 FURNITURE

- Move and/or disassemble all furniture for crack-and-crevice treatment, making sure to treat inside the furniture as well as the floor underneath

### 4 PETS AND BEDDING

- Ask where pets spend the most time in the house and thoroughly check all areas for fleas and ticks
- If the pet sleeps in or spends much time in a bedroom, the bed (including headboard) should be disassembled and treated
- Request that the customer launder all bed skirts and bed linens

The outcome of any treatment is dependent in large part on the prep work customers do before flea products are applied. Working together, PMPs and homeowners can fight fleas successfully with the Precor® family of products.

To accommodate an array of application sites, Zoëcon has developed the comprehensive Precor® product lineup. Precor 2000® Plus Premise Spray, Precor® IGR Concentrate, Precor® Plus Fogger and Petcor® Flea Spray feature the insect growth regulator (S)-methoprene, effectively breaking the flea life cycle. The migrating active ingredient prevents future flea populations and provides long-term residual control. In addition to the IGR, Precor® 2625 Premise Spray adds the power of an insecticide, etofenprox, to knock down adult fleas. To learn more, visit [Zoecon.com](http://Zoecon.com).



# STEADY AS SHE GOES: PMPs Remain Consistent In Their Approach to Flea Treatments

Like their fellow pest brethren, once fleas are inside a home or apartment they are quite stubborn about leaving.

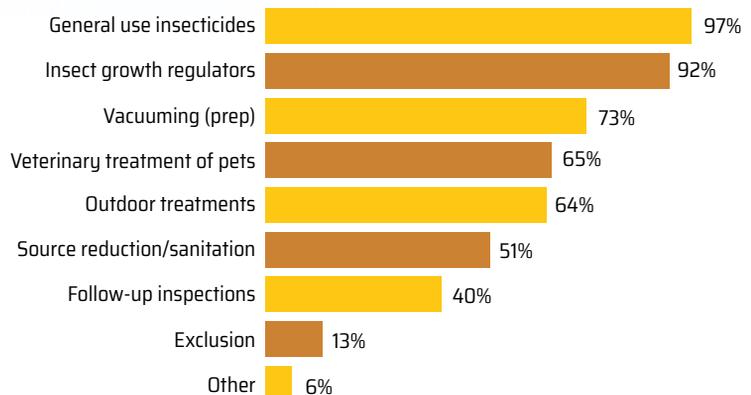
The job of removing fleas from furniture, baseboards, carpets and yards falls to pest professionals and they deploy an array of service protocols, according to the 2018 PCT State of the Flea Market Survey.

General use insecticides remain the top treatment of choice for pest professionals with 97 percent of those responding they deploy them for flea control. Right behind was the use of insect growth regulators (IGRs) at 92 percent.

“Our approach to managing fleas has remained consistent and the products available get the job done,” says Darren Van Steenwyk, B.C.E., technical director

## SERVICE PROTOCOLS INCLUDED IN FLEA CONTROL PROGRAMS

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



(Source: Readex Research; Number of respondents: 218)



## FLEAS = LOW CALLBACKS

No one wants callbacks. They are costly and time consuming, and don't contribute to a positive brand image with customers.

When it comes to callback rates for flea control services, 44

percent of respondents to 2018 PCT State of the Flea Market Survey said they experienced callback rates between 1 and 4 percent.

How does this measure up against other pests? When asked about callbacks for ant jobs, 31 percent of PMPs in the PCT State of the Ant Market report indicated their callback rates ranged between five and 14 percent.

*Source: 2018 PCT State of the Flea Market Survey*

for Clark Pest Control in Lodi, Calif. "The combination of general use insecticides and IGRs allows us to gain control of most any flea situation a customer may have."

What other tools are pest professionals using to control fleas? Vacuuming, veterinary treatments, exterior treatments, source reduction/sanitation, follow-up inspections and exclusion were among the solutions pest management pros listed.

In 2018, there was a six percent increase in source reduction/sanitation — 51 percent vs. 45 percent — indicating that the role of the customer in achieving a successful flea job is rising.

Visits to veterinarians for on-animal treatments saw a 5 percent increase (65 percent) from a year ago, despite research to the contrary from the U.S. National Institutes of Health's National Library of Medicine that indicates dog owners' adherence to flea and tick treatments falls short of veterinarians' recommendations.

Dr. Nancy Hinkle, a researcher and well-respected flea expert at the University of Georgia, says pest management professionals should have a working knowledge of what on-animal flea control products are available.

"PMPs should not be making recommendations on products or treatment regimens but they should be familiar with how these products fit into an overall flea prevention strategy and be able to communicate that to customers," says Hinkle. 🐾

## Don't Forget About The Outside

WHILE MOST CONSUMERS ENCOUNTER and are annoyed by fleas inside their homes, that shouldn't stop pest professionals from conducting a thorough inspection and making the appropriate treatment on the outside.

According to pest professionals surveyed by PCT for this report, 64 percent of respondents said they perform outdoor flea treatments — a two point gain from 2017.

Dr. Nancy Hinkle, a noted flea expert with the University of Georgia, says even if pets are outdoors briefly, they risk exposure to fleas.

"It only takes one cat, skunk, raccoon or opossum to introduce fleas to a yard and your pet's resting areas," says Hinkle. "Fleas are very resourceful when it comes to getting to animals both indoors and outdoors."

Darren Van Steenwyk, B.C.E., technical director for Clark Pest Control in Lodi, Calif., says technicians have experienced strong flea pressure on the exterior of homes in and around pet resting areas.

"Many pets never leave their yard so it is important that customers try and keep other animals out and for PMPs to include the exterior of a home on their inspection prior to service," says Van Steenwyk.

He says failure to account for and treat around the exterior of a home for fleas will not only prolong the pet's suffering but will make it easier for fleas to gain access inside.

"Not treating for fleas or any pest that is in close proximity to a home can leave it vulnerable to an infestation," adds Van Steenwyk.

Like all pests, early detection is the key to gaining control.

"Encourage customers not to wait until the flea problem becomes unbearable before they call for service," says Van Steenwyk. "The sooner they call, the sooner a solution can start to be applied, and the sooner they and their pet will get relief."

### Four Things to Know About Exterior Flea Inspections and Treatments

1. Concentrate your initial inspection on areas in and around the property where pets spend time including lawns and shaded areas under landscape bushes.
2. Recommend to customers that they keep their grass cut, and trim weeds and overgrown shrubbery which give fleas shelter.
3. Even if your customer doesn't have pets, people, yards and homes can be plagued by fleas. Animals such as feral cats, opossums or rodents are willing and able flea transporters.
4. Traps and exclusion methods can prevent fleas from settling in and establishing a harborage location.

### THE FLEA COMBO PLATTER

**83%** of pest professionals indicated they use a combination of general use insecticides and IGRs to eliminate flea infestations.

*Source: 2018 PCT State of the Flea Market Survey*

**ABOUT THIS SURVEY.** The State of the Flea Market survey was conducted by Readex Research and closed with 228 responses – a 5.4% response rate. The margin of error based on 228 responses is plus or minus 6.3 percentage points at the 95% confidence level. Results may not add up to 100 percent due to rounding.

# FLEA CONTROL AND PREVENTION: A Working Partnership With Consumers

According to the American Pet Products Association (APPA), pet owners in the United States spent \$69.4 billion on goods and services for their furry, feathered and finned companions in 2017. That's a lot of bones, leashes and trips to the veterinarian.

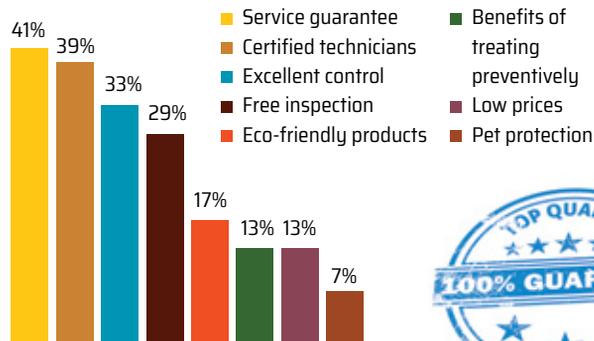
One of the most common health-related issues pet owners spend money on is protecting their dog or cat from fleas and ticks. With prime flea and tick season upon us, consumers will be looking to protect their pets.

Protecting pets from fleas and ticks is a job that is split among three groups — pet owners, veterinarians and pest management professionals.

PMPs and veterinarians bring expertise to the table in the battle against fleas and both seek to connect with and educate consumers to make sure dogs and cats are protected. But making that connection is not as easy as you may think.

## ASPECTS OF FLEA CONTROL SERVICES FEATURED IN MARKETING EFFORTS

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

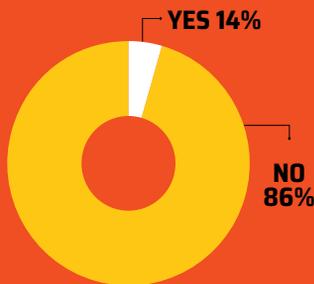


(Source: Readex Research; Number of respondents: 218)



## PROPORTION WHO THINK CUSTOMERS UNDERSTAND RISKS ASSOCIATED WITH USING "BUG BOMBS"

Do you think your location's customers understand the risks associated with using "bug bombs" as a do-it-yourself flea treatment?



(Source: Readex Research; Number of respondents: 218)



In exclusive research conducted for the 2018 PCT State of the Flea Market, pest management professionals indicated that 58 percent (mean) of consumers are likely to try and solve their flea control problems themselves before calling a professional.

When it comes to seeking flea control options from veterinarians — Americans average 2.7 vet visits annually — 39 percent of dog and 19 percent of cat owners seek information on or buy flea/tick protection/prevention/cure products.

The APPA study also revealed that while almost all veterinary hospitals recommended 12 months of flea and tick prevention, dog owner opinions and actions show that their flea and tick treatment adherence falls short of veterinarians' recommendations.

Surprisingly, only 62 percent of dog owners recalled the vet's recommendation and fewer actually followed up on the vet's 12-month treatment recommendation. The study estimated the actual flea and tick prevention coverage averaged

only six months based on owner medication purchasing statistics.

While it is not the job of pest management professionals to assess the medical needs of pets, they can promote better flea control and pet health education by sharing information in leave-behind collateral, emails, social media and web site content.

And with the high number of DIY flea control being done by consumers, educating customers about the value of professional pest management services is important. Consider the fact that 86 percent of pest professionals surveyed do not think their customers understand the risks associated with using "bug bombs" as a means of do-it-yourself flea or pest control.

It might be a reaction to the DIY trend among pet owners but more pest professionals — 39 percent in 2018 vs. 34 percent in 2017 — are featuring that certified, highly trained technicians will be performing flea services and protecting their pets and families. 🐾

## Talking With Customers About Fleas

SINCE FLEAS HAVE THE ABILITY to quickly escalate into a major issue for customers, stressing a preventive approach is the best way to avoid a flea issue. Having a conversation with your customers about the important role they play in protecting their pets is something PMPs should do.

Customers may not know or may have incorrect information on how their pets become at risk for fleas. Explaining that dogs and cats most often get infested with fleas through contact with other animals or by spending time outdoors is a starting point.

It is also valuable to point out that because fleas have significant jumping ability, they are easily able to hitch-hike into homes while hidden in the fur of family pets, and once inside, they quickly multiply and infest bedding, furniture and clothing.

What type of reaction should pet owners expect should their dog or cat become infested with fleas? Most pets experience itching, but some sensitive animals can have more severe reactions such as hair loss, inflammation and secondary skin infections.

Part of a preventive approach to flea control is having pet owners follow this checklist:

### The Preventive Flea Control Checklist

- ✓ Vacuum carpets, floors and furniture on a regular basis.
- ✓ Check pets frequently for ticks and fleas. Be aware of excessive scratching and licking.
- ✓ Avoid walking dogs in tall grass, where fleas and ticks often hide.
- ✓ Bathe pets after walks or playtime with other animals.
- ✓ Frequently wash pet bedding, collars and plush toys.
- ✓ Wash bed linens and vacuum carpets, floors and furniture frequently.
- ✓ Discuss preventive measures with your veterinarian.

### Fast Flea Fact: What To Talk About With Customers?

When responding to the question of what service protocols are included in their flea control programs, **51 percent** of pest management professionals said source reduction/sanitation is part of an effective treatment protocol. That is a **six percent** increase over last year. Both items are fully under the control of your customer and should be one of the first things you discuss with them when designing a program.

*Source: 2018 PCT State of the Flea Market Survey*

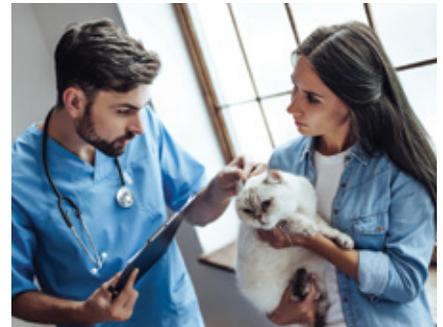


### Following Doctor's Orders

Part of a proactive, preventive flea control program is encouraging customers to talk with their veterinarian about on-animal treatment options. How often is a preventive treatment prescribed by a veterinarian part of a PMPs flea control program?

The PCT survey revealed that **65 percent** of pest professionals recommend veterinary treatment of pets as part of their flea control programs, a five point jump from last year's report.

*Source: 2018 PCT State of the Flea Market Survey*



## MILLENNIALS AND THEIR PETS: AN OPPORTUNITY?

WITH MORE THAN 68 PERCENT OF U.S. households or roughly 85 million families owning pets, it should come as no surprise that the pet care market is an engine with serious horsepower.

Millennials, in particular, are taking the humanization of their pets to the next level. According to the American Pet Products Association, millennial pet owners are more willing to spend more on products and services for their four-legged companions.

Research conducted by the association reveals millennials are more likely to take their pet to the vet more often, give them flavored oral medication and provide them vitamins. They buy more pet toys, pet health insurance and are willing to spend more for upscale boarding and care.

Does this buying behavior present an opportunity for pest professionals to market flea control, as well as other pest services to this sought-after demographic?

With the willingness of millennials to spend on their pets, and their known preference for convenience, pest professionals might be wise to "scratch the itch" and target flea control services to their pet-loving millennial clients.

### Millennial Dog Owners Are More Likely To:

- Take their pet to the vet more often, give them flavored oral medication and give them vitamins
- Pay for any pet service (day care, boarding, pet sitting at home)
- Have been to a pet-friendly restaurant
- Take their dog with them on errands and to a dog park
- Own designer items for their pet and hold parties for their dog
- Buy gifts for more occasions, spending more per gift and getting more gifts

*Source: American Pet Products Association*



ideal for flea and tick control



long-term residual control



optimal for indoor flea infestations

# EXPERT GUIDANCE. EMPOWERING CONTROL.

Precor® products provide complete, consistent control

Packing a powerful punch, the Precor® product line-up leaves you feeling sure you got the job done against fleas and ticks indoors, surrounding you and your customers with confidence. Using the original insect growth regulator (IGR) developed by the experts at Zoëcon, Precor® products provide seven months of control against fleas to help reduce call-backs. The team of experts at Zoëcon is ready to help you find your perfect Precor® formulation.

To talk to an expert Zoëcon representative about Precor® products, visit [ZoeconFieldGuide.com](http://ZoeconFieldGuide.com). Find more information at [Zoecon.com](http://Zoecon.com).

