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State of the
WILDLIFE
MARKET
• 2018 •

INSIDE

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The Opportunity is Here: **GROW YOUR BUSINESS** *with* **WILDLIFE MANAGEMENT**

PCT has been hard at work collecting information about the explosive growth of opportunity in wildlife management across North America. They've put together research that proves what professionals have seen in recent years — that wildlife management can no longer be ignored by PMPs who want to expand and grow their services.

The market is dynamic. Competition has never been fiercer. The companies that successfully adapt to this change will be the ones that succeed this year, next year and for the foreseeable future.

How can professionals capitalize on this opportunity?

For one, they can speak to Univar.

We've already invested in training and equipping our teams to understand the unique challenges of wildlife management. As a result, they're passing on their expertise to Univar customers who want to extend their service offerings. We've also assembled a collection of products, equipment and training PMPs can depend on to get started with wildlife management today.

What it means to be a pest management business is evolving fast. Companies like yours are expanding and hiring to offer more services and take on exciting new changes in the pest management industry.

We look forward to working with leaders, big and small, who are ready to change with it.



Trace McEuen
Vice President
Univar Environmental Sciences — Americas




 Call of the
WILD

PCT's inaugural State of the Wildlife Market report provides an overview of trends and insights from PMPs who have made wildlife services a profitable part of their businesses.

Industry consultant and North Fulton Pest Solutions President Joseph Edwards recalls a time when companies offered either general pest and termite control or wildlife control. “Fifteen years ago, these services were more segregated. Gradually, wildlife companies started getting into general pest control and vice versa,” he says. “Over time we’ve found that, although these are two totally different animals, the right approach can lead to success in both service areas.”

In 2018, PCT set out to uncover how many of our PMP readers offer wildlife control services and what their perspectives are on the market for these services. Our 2018 State of the Wildlife Market survey revealed that more than half (53 percent) offer wildlife services, and that many chose to enter this arena to either boost their business during slow winter months or fill a market need.

“We got into wildlife at a time when very few pest control operators were doing it,” says Chad Betts of Betts Pest Control. “We saw a potentially profitable niche market and thought that diversifying could provide us with more steady work during winter months. What we

didn’t foresee was that it would also create more work in the summertime, when animals come in to water at swimming pools and goldfish ponds. Overall, taking on wildlife services has been very good for our business.”

Jim Miller Jr. started his pest management company, Yale Termite & Pest Elimination Corporation, performing both general pest and wildlife. “I had always been a trapper and thought that if I was going to offer pest control, it should also include wildlife services. I wanted to be a one-stop shop for customers, fulfilling all of their pest control needs.”

Mat Ledyard worked for 15 years with a company that referred wildlife calls to other companies. “I watched as customers became disheartened by not getting the immediate response from those companies they wanted, so it made sense to me to take on that role.” Ledyard built Black Dog Pest Solutions in 2014 and has grown his wildlife business every year.

Edwards, Betts, Miller, Ledyard and the other PMPs who reported providing wildlife control services have spent, on average, 11 years in wildlife control.

The great majority of these respondents express confidence in the business performance and potential for this area of specialization:

- 96 percent say the incidence of wildlife problems has increased or stayed the same over the past year.
- 79 percent say wildlife control services have been a steady or more significant portion of their company’s business over the past five years.
- 94 percent expect their wildlife revenue to increase or remain the same in 2018 (as a percentage of their overall business).

Even with the promising market outlook, though, 43 percent of PMPs choose not to offer wildlife services. That’s not surprising, Edwards says, because wildlife isn’t for everyone. “Adding wildlife management may or may not be a profitable venture, depending on your market, staffing and other considerations,” he explains. “Assessing the potential profitability of wildlife services requires conducting the proper due diligence into the associated investments you’ll need to make regarding the

additional costs for equipment, liability insurance, workers' comp, training and education."

THE RIGHT PEOPLE FOR THE JOB

Hiring for, or assigning the right people to, your wildlife team is essential, says Edwards, explaining that wildlife requires a certain passion for animals and the outdoors. Additionally, as wildlife protocols have evolved to include more extensive roofline exclusions (working primarily

from extension ladders), individuals with experience in home repairs, roofing, gutter installation or similar handiwork are likely to be better suited for wildlife services.

Case in point: Matt Breda got into wildlife services during the housing collapse in 2009, when he recognized an opportunity to diversify while helping create new job opportunities for experienced but out-of-work framers and carpenters. "I can teach technicians

pest control skills but not carpentry skills," says the owner of Breda Pest Management. "Putting on harness gear, climbing ladders and doing the necessary exclusion work is no issue for these pros. Once we got this team into place, wildlife work became the largest part of our business. Our momentum continues today; in fact, we've grown more aggressively in the past six months than ever before."

Tim Bird of Mayday Pest Solutions

What's Holding You Back?

Why do 43 percent of PMPs choose not to offer wildlife control services? We asked a few why they've decided not to diversify.

PROFITABILITY AND CORE COMPETENCY FACTORS

Many PMPs believe that adding wildlife services would pull assets away from the pest control services they've built their reputations on. They're opting to stick with their core services rather than investing in new equipment, training and personnel.

"In the past few years, we've discussed the possibility of adding wildlife services," says Bryan Vaughan of Loyal Termite & Pest Control. "After evaluating whether it's worth it to rework our schedules to accommodate daily trap monitoring and take all the steps we'd need to, including training our 30+ technicians, we kept coming back to the decision to keep focusing on what continues to make us great: general pest, mosquito and termite work."

Dan Conrad of Pro-Tech Termite and Pest Control expresses a similar view, explaining, "Although I've trapped a few raccoons in the past, I don't really feel comfortable with wildlife control. I also feel it would not be profitable, as it would take away from my main source of income: pest and termite control."

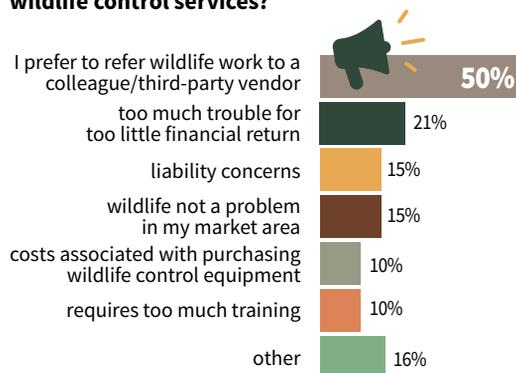
Bert Snyder says his team at Palmetto Exterminators provided wildlife services at one time but discontinued those services about a decade ago. "It isn't part of our core business model of providing recurring general pest and termite control services," he says. "Basically a one-time service, wildlife calls were a distraction, pulling assets away from our recurring revenue services."

TECHNICIAN SAFETY AND LIABILITY CONCERNS

Ed Prine of Sonic Services says his concern for technician safety prevents him from taking on wildlife management. Located just north of Atlanta in fast-growing Forsyth County, Sonic has seen its clientele shift to affluent new developments. "Most of the homes being built here today are three stories and have steep pitch roofs that create a dangerous situation for technicians; I'm not putting my people in jeopardy," he says. Prine also questions whether customers value the necessary exclusion work. "Customers don't want to hear that keeping squirrels out of their attic might cost a few thousand dollars. I do their general pest control for them, and if they ask about squirrels, I explain what they can do on their own, or refer them to a wildlife specialist."

Obstacles Preventing Offering Wildlife Control Services

What has prevented your location from offering wildlife control services?



Number of respondents: 154 (those whose location DOES NOT offer wildlife control services); Respondents could select more than one answer; Source: Readex Research

INSUFFICIENT DEMAND

Variations in state and local involvement in wildlife control can make a huge difference in market opportunity. Derby Schafer of A Access Denied Pest Control explains, "In our 30-plus years of operation, we haven't had a single request for wildlife control because the city of Las Vegas and Clark County are licensed to handle animal control. Residents automatically call Animal Control, and I don't blame them: Why pay for a service you can get free?"

Of course this isn't the case everywhere. Chad Betts benefits from the other extreme. "Eighty to 90 percent of the wildlife calls we get at Betts Pest Control are referrals from the Kansas Fish & Wildlife Service. People call them thinking they offer control services, but they don't," he says. "Fish & Wildlife gives them the names of the three of us in the area who have the required nuisance wildlife control permit, and we make sure we're the most responsive."

While wildlife control may not be for everybody, there's definitely a growing need for these types of services. Before entering the field, however, it's important to do your homework to make sure wildlife services fit into your company's long-term goals. ●

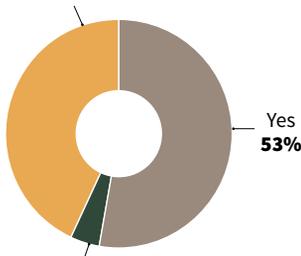
adds, “The right technicians for wildlife work are not only comfortable with animals but also (are) detail-oriented, handy and unafraid of heights and tight spaces. Doesn’t it seem that it’s always the tightest part of the attic that needs repaired?”

Dan Rao of MD Weaver Corporation, who also looks for handy, acrophobia-free employees, says that training and licensing wildlife technicians can be somewhat extensive. In states like his own, Massachusetts, technicians are required to have local trapping licenses in addition to the requisite Problem Animal Control (PAC) licenses. “We spend a considerable amount of time on training and education — from wildlife courses to OSHA and GreenPro safety education,” he says. “We commit to doing everything we can to help our technicians succeed.”

Proportion Offering Wildlife Control Services

Does your company location offer wildlife control services?

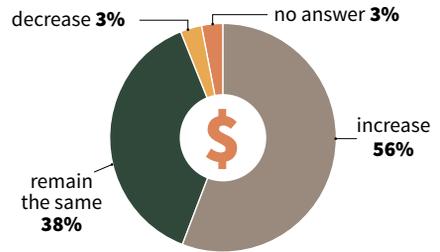
no, and do not plan to in the next 12 months **43%**



no, but plan to in the next 12 months **4%**
 Number of respondents: 328; Source: Readex Research

Anticipated Change in Percentage of Revenue From Wildlife Control Services

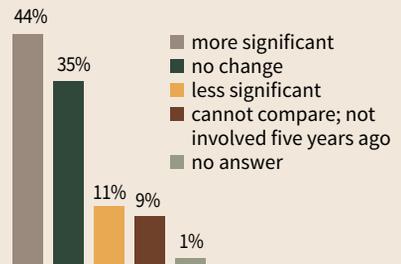
Compared to 2017, do you anticipate the percentage of your location's revenue generated from wildlife control services to increase, decrease or remain the same in 2018?



Number of respondents: 174 (those whose location offers wildlife control services); Source: Readex Research

Change in Portion of Business Dealing With Wildlife Control Services

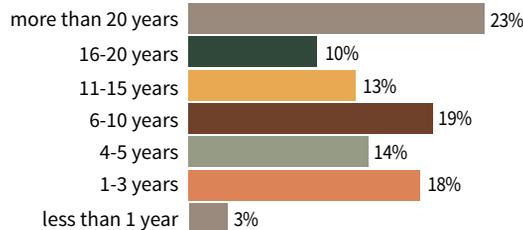
In the past five years, have wildlife control services become a more or less significant portion of your location's business?



Number of respondents: 174 (those whose location offers wildlife control services); Source: Readex Research

Length of Time Offering Wildlife Control Services

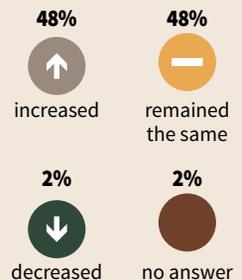
How long has your location been offering wildlife control services?



Number of respondents: 174 (those whose location offers wildlife control services); Source: Readex Research

Change in Incidence of Wildlife Control Problems

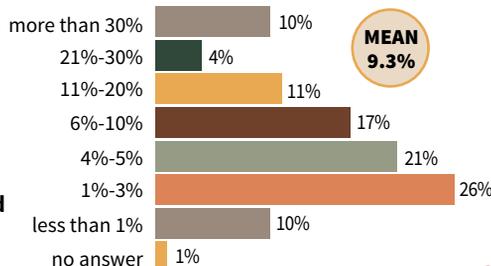
In the past year, do you feel the incidence of wildlife control problems has increased, decreased or remained the same in your market area?



Number of respondents: 174 (those whose location offers wildlife control services); Source: Readex Research

Percentage of Revenue Generated from Wildlife Control Services

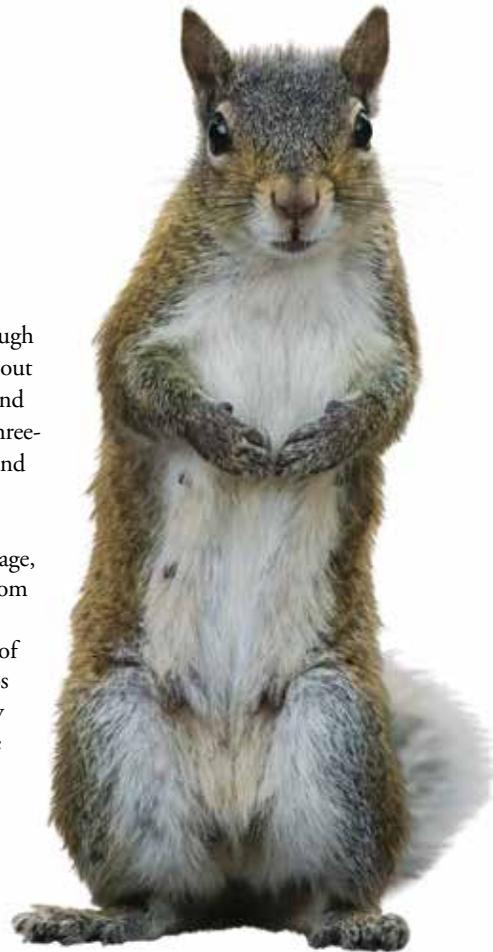
What percentage of your location's overall service revenue in 2017 was generated from wildlife control services?



Number of respondents: 174 (those whose location offers wildlife control services); Source: Readex Research



SQUIRRELS GONE WILD: WHICH PESTS ARE PESKIEST?



The animals causing customers distress can vary widely from region to region, although some — namely squirrels, raccoons, opossums and birds — are abundant throughout the U.S. In fact, 87 percent of PMPs say they offer squirrel and raccoon services, and 39 percent credit squirrels for the largest percentage of their wildlife calls. About three-fourths of PMPs offer opossum (75 percent) and/or bird services (71 percent), while around two-thirds (66 percent) manage skunks. More than half offer bat (63 percent), snake (61 percent) and mole (56 percent) services.

Based on our research, it's hard to say which of these pests are the most difficult to manage, because PMPs' responses to our "hardest to manage" question were all over the board: from moles, squirrels and raccoons to coyotes, snakes, birds, armadillos and others.

"We're located in a fast-growing suburb of San Antonio. The construction work on all of the subdivisions that are springing up has disrupted skunks, opossums, raccoons, armadillos and squirrels in addition to our main pest issue — rats — so we're dealing with many types of wildlife," says Tim Bird of Mayday Pest Solutions. "While I can't say that any one of these is harder to manage than another, I will say that armadillos are tough on traps. We live trap just about everything, and armadillos' hard shells can just tear up the traps. When we catch one of these, or when they wander into a trap by accident, there's a 50 percent chance we'll have to replace that trap."

In Metro Atlanta, Breda Pest Management finds flying squirrels most challenging. "We most often get calls for gray squirrels, flying squirrels and bats. Flying squirrels can get into attics through the tiniest holes, so our technicians have to take more time and care doing a meticulous inspection," says Matt Breda.

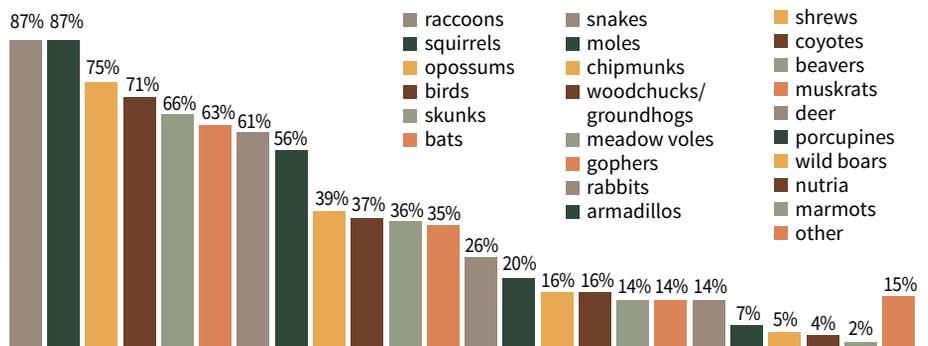
Bats can be labor-intensive as well, says Jim Miller Jr. of Yale Termite & Pest Elimination Corporation. "Bats require more specialized exclusion expertise," he says. "You need a technician who's comfortable with heights and willing to use ladders, ropes and lifts to get the access they need to complete the work. The upside? Those extra efforts make bats a higher-ticket pest. Among wildlife, they are our biggest moneymaker." 🍎



Number of respondents: 174 (those whose location offers wildlife control services); Respondents could choose more than one answer; Source: Readex Research

Raccoons and Squirrels Make the Phone Ring for PMPs

What pests are included in your location's wildlife control service offerings?



To Every Pest, There Is a Season

Weather conditions often play a central role in the need for wildlife control services. In his 25 years of pest management experience, Dan Rao, technical manager of MD Weaver Corporation in Natick, Mass., has learned to anticipate various species at various times of the year. “We know we’ll get calls for raccoons, skunks and woodchucks in spring and summer, and for gray squirrel and bat evictions in the fall. (Since bats are protected in Massachusetts, attempts to evict a colony of bats can be made only in the early spring or late summer.) In winter, aside from an occasional attic dweller or skunks under a deck, our wildlife calls slow down.”

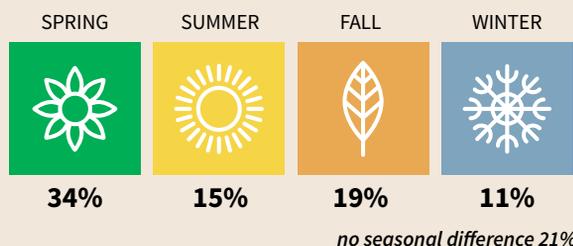
In Wichita, Kan., wildlife business stays fairly steady year-round, says Chad Betts of Betts Pest Control, which offers gopher, mole, possum, squirrel, skunk and raccoon services. “When it’s really hot — 95 or 100 degrees during the day — and in the really cold days of winter, especially when the cold sticks around for a while, we get a lot of calls as animals invade homes to get relief from the weather,” he explains. “Early spring is always good for a small spike, too — primarily raccoons getting into attics to have babies.”

In some areas, rain also can make a big difference in pest pop-

ulations. Tim Bird of Mayday Pest Solutions shares, “When it rains in Texas, it’s never a sprinkle. We usually have flood warnings. The sheer amount and speed of rain disrupts the environment and gets wildlife moving.”

Busiest Season For Wildlife Control Services

For your location, what season tends to be the busiest for wildlife control services?



Number of respondents: 174 (those whose location offers wildlife control services); Source: Readex Research

ABOUT THIS REPORT

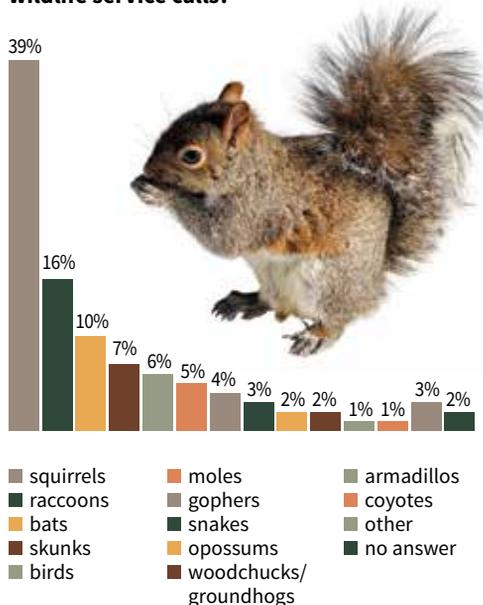
The PCT 2018 State of the Wildlife Market survey was sponsored by Univar Environmental Sciences and compiled by Readex Research, a privately held research firm based in Stillwater, Minn.

The survey sample of 4,169 owners, operators and executives of pest control businesses was systematically selected by GIE Media and Readex from emailable recipients of PCT at unique company locations in the United States. Data was collected from March 29, 2018, to April 10, 2018, with 328 total responses — a 7.9 percent response rate. The margin of error for percentages based on the 328 responses is ± 5.3 percentage points at the 95 percent confidence level.

Results may not add up to 100 percent due to rounding.

Pest Representing the Largest Percentage of Wildlife Service Calls

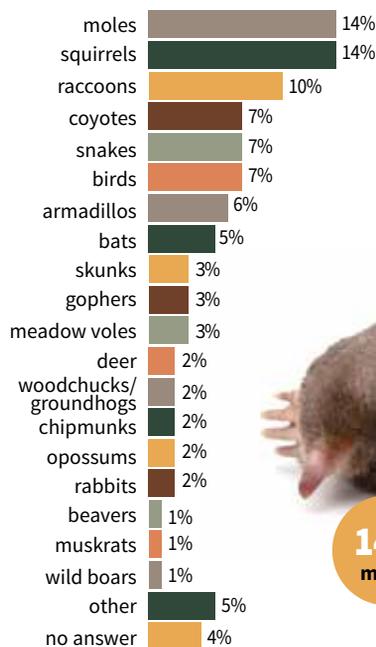
What pest represents the largest percentage of your location’s wildlife service calls?



Number of respondents: 174 (those whose location offers wildlife control services); Source: Readex Research

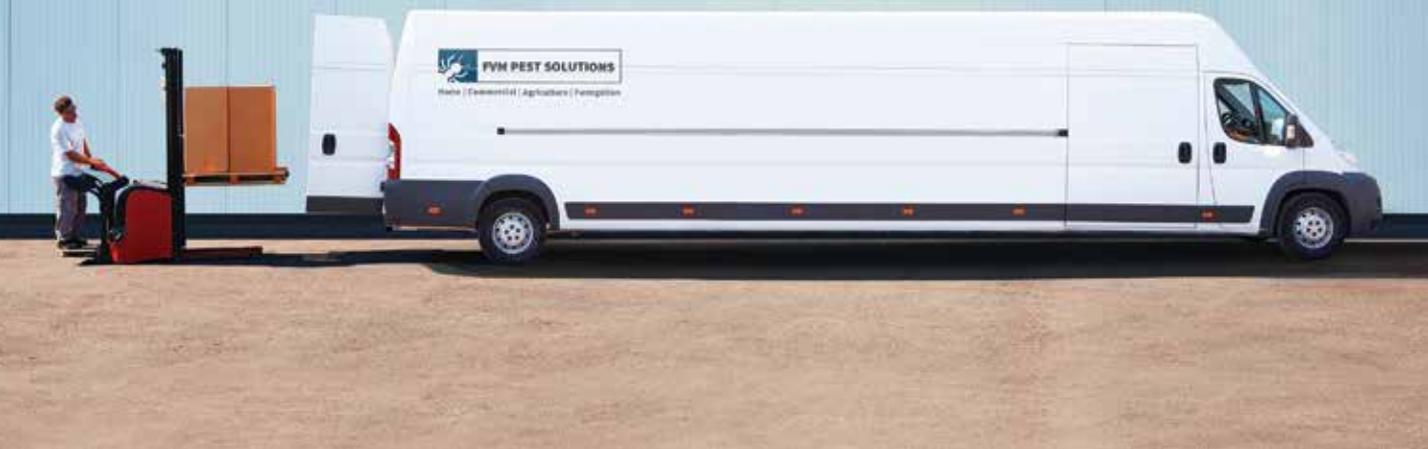
Most Difficult Wildlife Pest to Manage

What wildlife pest has proven most difficult for your location to manage/control?



Number of respondents: 174 (those whose location offers wildlife control services); Source: Readex Research

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