

2019 *state of the* WILDLIFE CONTROL MARKET



inside:

MARKET OVERVIEW & KEY TRENDS

MOST WIDELY IMPLEMENTED IPM STRATEGIES

HOW PMPs MARKET THEIR WILDLIFE SERVICES

FUTURE FORECAST: A GROWING MARKET SEGMENT

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GROW YOUR BUSINESS WITH WILDLIFE MANAGEMENT:

the time is now

Entering a new market is a lot like successfully managing pests: timing is everything. Recognizing when to pursue an opportunity — and where to get started — can dramatically increase your chance of success.

Over the past year, PCT has kept a close eye on wildlife management across North America. They've detailed the growing need for PMPs to take on this massive opportunity. At the same time, our team at Univar Solutions has worked closely with businesses of all sizes to help pave their way into this booming market.

On both fronts, the takeaway has been clear: the time to enter the wildlife market is now. And the easiest place to start is wildlife exclusion.

Incorporating exclusion into your business is simpler than you think. After some basic training, your team can quickly add these profitable services to your existing residential and commercial treatment strategies. Building owners will be quick to understand the value of preventing potential damage to their properties. And whether you need help with product selection or application techniques, Univar Solutions is ready to help grow your route revenue.

We've already built the infrastructure to ease your business into wildlife exclusion — and wildlife management as a whole. From a full array of products and ProTraining courses to an experienced team of knowledgeable reps, we deliver the knowledge and technology for you to manage your team, your inventory, and your business's future.

We have everything in place to help you strike while the iron's hot. Give us a call at 1-800-888-4897 or visit PestWeb.com/grow to get started today.

Doug Wyly

Doug Wyly
Business Development Manager
Univar Solutions Environmental Sciences



2019 state of the WILDLIFE CONTROL market



WILDLIFE CONTROL COVERS A LOT OF GROUND – AND HIGHER ELEVATIONS, AS WELL. LEARN WHERE THIS INDUSTRY IS HEADED, GET SOLUTIONS TO COMMON CRITTER AND BUSINESS ISSUES, AND EXPLORE HOW BEST TO PROVIDE THIS SERVICE.

THE MARKET: WALKING ON THE WILD SIDE

Half of pest management companies offer wildlife control services, which on average generated 11 percent of total company revenue, according to the PCT 2019 State of the Wildlife Control Market survey, which was sponsored by Univar Solutions and conducted by independent market research firm Readex Research.

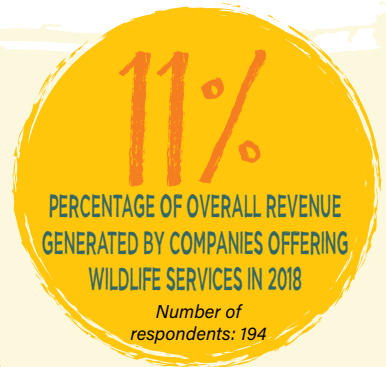
For American City Pest & Termite in Los Angeles, “it’s one of the lower-revenue generating parts of our business” but is a profitable one, said Operations Manager Greg Bausch.

At North Fulton Pest Solutions in Alpharetta, Ga., the service accounts for closer to 30 percent of revenue. “It wasn’t that way in the beginning. Over time it’s become quite significantly more,” said President Joseph Edwards. He grew wildlife control because the revenue it generates helps even out the company’s cash flow during winter months, when wildlife activity is high and general pest and termite revenue declines. “We just felt like it was a good complement all the way around,” he explained.

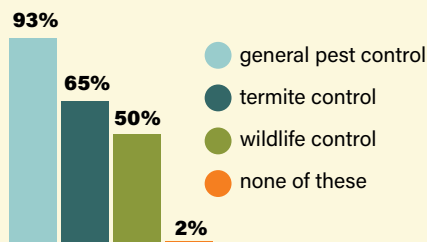
Thirty-nine percent of PMPs said wildlife control services have become more significant to the business over the past five years; 44 percent said the impact of this service offering did not change, found the survey.



WILDLIFE CONTROL: *a growing market*

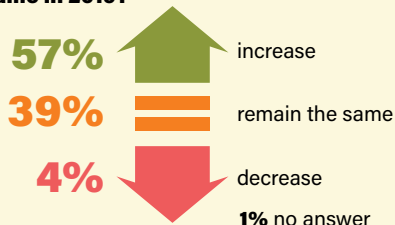


Which of the following services does your company location offer?



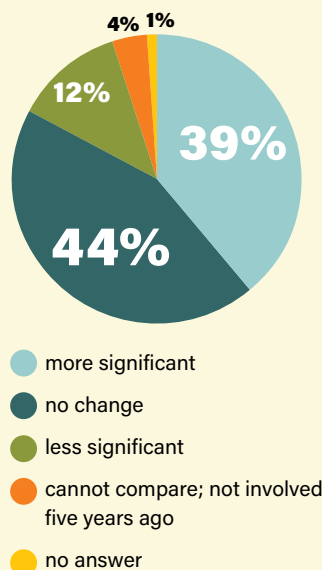
Number of respondents: 389

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



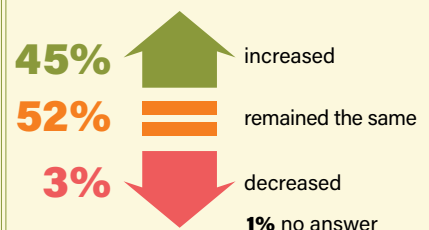
Number of respondents: 194

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



Number of respondents: 194

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



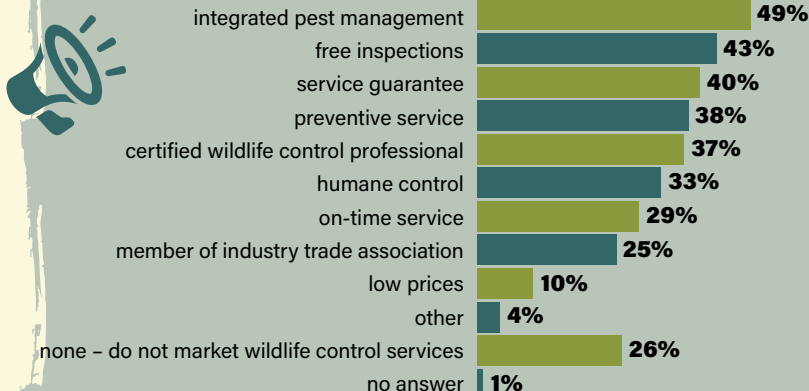
Number of respondents: 194



Number of respondents: 194

HOW DO PMPs PROMOTE THEIR WILDLIFE SERVICES?

What aspects of your location's wildlife control services are featured in your marketing efforts?

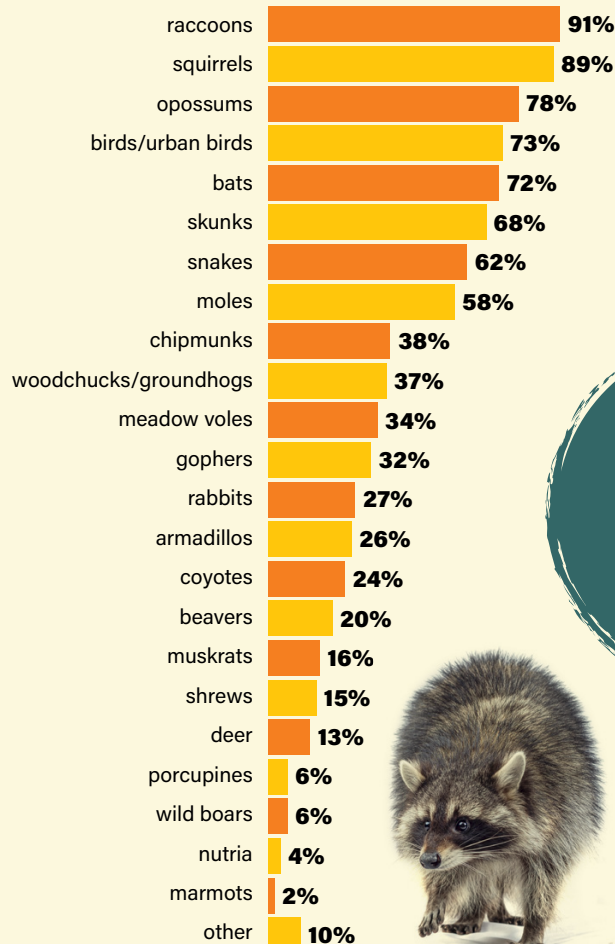


Number of respondents: 194; Respondents could select more than one answer.



WILDLIFE CONTROL SERVICE OFFERINGS

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

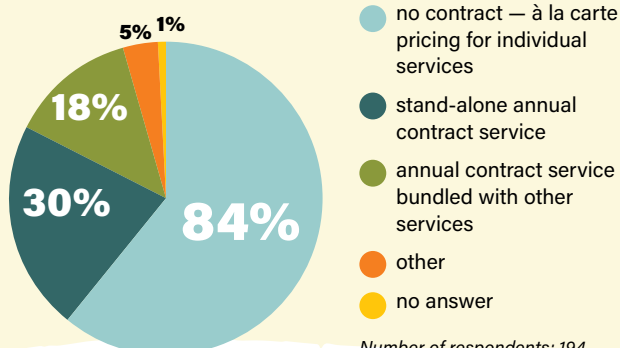


Number of respondents: 194



WILDLIFE CONTROL OFFERINGS VARY

In what ways does your location offer wildlife control to its customers?



Number of respondents: 194

ON-SITE EUTHENASIA CAPABILITIES

Does your location have wildlife euthanasia capabilities on-site?



39%

no answer
1%

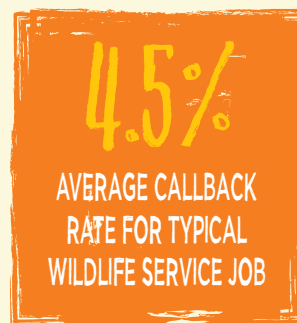
60%



Number of respondents: 194



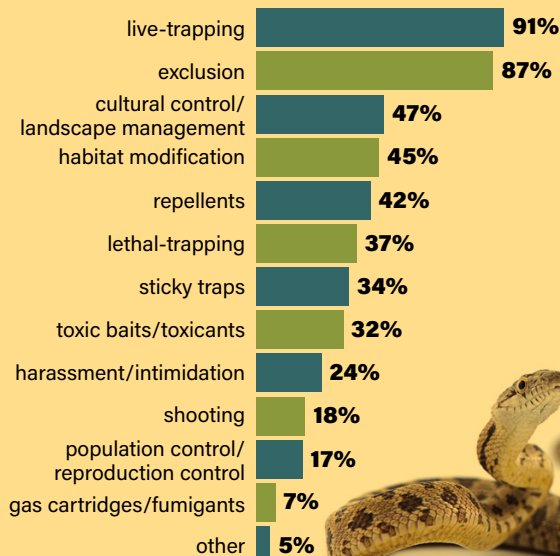
Number of respondents: 194



Number of respondents: 194

MOST POPULAR CONTROL OPTIONS

What types of control measures does your location use to manage wildlife around homes and/or businesses?



Number of respondents: 194



THE CRITTERS: FUR, FEATHERS + SCALES

More than half of PMPs (52 percent) said the frequency of wildlife control problems stayed the same in their markets over the past year; 45 percent cited an increase.

While nuisance wildlife varies by region, PMPs generally offer control services for raccoons (91 percent), squirrels (89 percent), possums (78 percent), birds/urban birds (73 percent), bats (72 percent), skunks (68 percent) and snakes (62 percent), found the PCT survey. The three most difficult to control, reported PMPs, were raccoons (12 percent), birds/urban birds (11 percent) and squirrels (10 percent).

Moles and voles are the most challenging for North Fulton Pest Solutions. “We have actually discontinued our mole and vole control because we’ve had so many failures with that,” said Edwards. He’s tried spring traps, gel baits, smoke, CO₂, grub control and repellents to no avail. He thinks a bait that sterilizes could help reduce the populations of these critters, which have caused him to re-sod his own lawn four times in the past 17 years.

Residential coyotes are the biggest challenge for Durham-N.C.-based Clegg’s Pest Control, said Vice President Phil Clegg Jr.

Terminix Branch Manager Greg Johnson has seen an increase in bobcats on large corporate campuses in the north Dallas suburbs. While he considers the

bobcats harmless, “they scare people. When you have a campus of several thousand employees it only takes a couple that are fearful and our customers have to react,” he said.

Feral cats pose a different kind of test, said Johnson, who recently removed 35 from a downtown Dallas building. “They’re a challenge because all of the cat lovers come and let them out of the trap,” he said.

THE CUSTOMER: SOLVE IT NOW

Both commercial and residential clients need wildlife control, said PMPs. At Advanced Services in Augusta, Ga., these jobs often stem from annual termite inspections.

“When our sales guys are doing those inspections, they may come across issues that weren’t there the year before or previous years. We know that wildlife can pretty much happen in an instant,” one day the client doesn’t have bats, the next day she does, said Kevin Hudson, who heads sales and marketing for the company.

Besides reaching out to existing customers, companies promote wildlife control services through online advertising, social media and vehicle wraps. According to the PCT survey, PMPs specifically promote integrated pest management (49 percent), free inspections (43 percent) and service guarantees (40 percent).

One third of pest management professionals said they highlight humane

practices in marketing their wildlife control services. In follow-up interviews, PMPs said that homeowners mostly want nuisance animals gone fast. On occasion, clients demand the animals be caught and released or dealt with in another manner.

Communication is key because most homeowners aren’t aware of regulations that protect some wildlife, like woodpeckers. “They think the problem has an easy solution but there are certain things we can’t do,” said Hudson.

THE HOW-TO: IPM WORKS BEST

Pest management professionals use various methods to manage wildlife around homes and businesses. The *primary* methods of control were live-trapping (48 percent) and exclusion (35 percent), found the PCT survey.

State and local regulations vary as to what species can be trapped and released. States may require permits to relocate certain animals, as well as written permission from owners and landowners to release them. Some species (often vectors of rabies) must be euthanized. According to the PCT survey, 39 percent of companies have wildlife euthanasia capabilities, such as a CO₂ chamber, onsite.

Most companies (90 percent) perform exclusion — sealing entry points and roofline gaps; screening vents — to prevent wildlife from accessing structures. Exclusion is done for both corrective and preventive wildlife services, and can be particularly challenging to do on tall



pest birds represent
a growing market
for wildlife control
professionals.



buildings and in urban areas without a lot of space for lift trucks and ladders. In follow-up interviews, PMPs said exclusion can be the most humane way to solve a wildlife problem.

PMPs also rely on cultural control/landscape management (47 percent) and habitat modification (45 percent), found the PCT survey. Johnson of Terminix prioritizes thinning vegetation and reducing food sources to make property less desirable so the animals go elsewhere.

He also uses repellents and harassment (cited by 42 percent and 24 percent of PMPs, respectively). He harasses coyotes and bobcats while the animals are hunting at night with lasers, lights and air horns. “They’re smart enough to know that if something is going to continue to harass them they just avoid the area,” he said. Johnson also repels the rabbits these predators are feeding on away from the buildings.

It’s important to understand an animal’s nesting, breeding and foraging behaviors. “We’ve got to think like that animal. To be able to think like that animal, you’ve got to understand the characteristics of that animal,” reminded Edwards.

Most PMPs (84 percent) said wildlife control is priced separately from monthly or quarterly general pest services, found the survey.

The typical wildlife job took an average of 1.6 hours with a callback rate of 4.5 percent. Nearly half of PMPs (49 percent) said spring is the busiest season for wildlife control.

The equipment most often provided to

technicians to perform these jobs included gloves (93 percent), live-catch traps (92 percent), flashlights (89 percent), ladders (86 percent), hand tools (85 percent) like power drills and screwdrivers, and safety glasses (76 percent).

“It’s so, so critically important to make sure that you have safety protocols in place and that you make sure that the individuals are adhering to those safety protocols,” added Edwards, citing risks that range from ladder use to aggressive animals.

OUTLOOK: SLOW AND STEADY

The majority of PMPs (57 percent) expected the percentage of wildlife control revenue generated at their companies to increase in 2019 compared to last year.

“I see it growing so much that I’m actually in the process of hiring another teammate for the home services division,” which performs wildlife control, said Hudson, Advanced Services. The company is expanding into new markets where wildlife control is not currently offered.

PMPs also expect urban sprawl to continue to displace wildlife, which will be attracted to abundant food and shelter in these communities. “They’ve got plenty to eat. People leave dog food out in their backyards and once you start getting a neighborhood restaurant here and there you’ve got a dumpster out back. There are plenty of food resources for all types of wildlife,” said Edwards, North Fulton Pest Solutions.

He believes more companies will look to the service to even out cash flow. “We’re seeing more and more pest control companies get into the wildlife industry, and we’re seeing wildlife companies that are trying their hand at pest control, as well,” he said.

Wildlife control will continue to be a solid contributor to the bottom line. “It’s just one of those slow, steady parts of our business,” said Bausch, American City Pest & Termite. 🍀

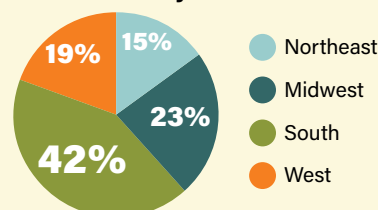
ABOUT YOU + THE SURVEY

The PCT 2019 State of the Wildlife Control Market survey was sponsored by Univar Solutions and compiled by Readex Research, a privately held research firm based in Stillwater, Minn.


A sample of 7,618 owners, executives and technical directors of pest control businesses was systematically selected from the PCT database. Data was collected from 389 respondents – a 5 percent response rate – via an online survey from June 3-11, 2019. The margin of error for percentages is plus or minus 7 percentage points at the 95 percent confidence level. Charts may not add up to 100 percent due to rounding.

15.6 YEARS THAT
RESPONDENTS’
COMPANY LOCATION
HAS OFFERED WILDLIFE
CONTROL SERVICES

From where do you hail?



Number of respondents: 389



Rob Seeger, President
RJS Pest Management Specialists
an Anticimex Company

“We achieved 30% year-over-year growth. **Univar Solutions** helped make it happen.”

When **Rob Seeger** of RJS Pest Management Specialists, an Anticimex Company, needed a more reliable way to bring timely service to commercial customers all across New York City, he called John Hichak, his sales representative at Univar Solutions.

That's because Rob and his team know that with Univar Solutions, expert advice and business support are just one call away. “No matter the ask, John and his colleagues are problem-solvers. We worked together on a creative solution that's helping RJS operate more efficiently and effectively.”

The result? Business at RJS is growing, and customer satisfaction is at an industry high. “How is it possible to compete in the most complex market in the U.S.? Choosing Univar Solutions as a partner is a great place to start!” Rob says.



How can Univar Solutions
help grow your business?
Find out at **PestWeb.com/grow**