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2024 state of the
FLEA CONTROL
..... *market report*



Inside:

- Flea Activity on The Rise
- Wildlife Control Combats Fleas
- Treatment & Prevention Key to Fleas
- Exclusive Research!

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PMPs indicated that there's an itch to scratch when it comes to flea control, reporting an uptick in flea activity and dedicated treatment plans.

They're the size of a poppy seed, but their share of the overall pest management business is slightly larger. Fleas account for 7 percent or less of overall revenue for nearly 70 percent of respondents to PCT's 2024 State of the Flea Control Market report, yet 25 percent say pressure has increased during the past year and there's an emphasis on identifying underlying culprits.

Managing fleas requires more than making sure the family pet gets a consistent preventive treatment.

"I am always telling customers that every year, fleas are getting worse and worse, and maybe that is because we started relying on the flea medications for our pets and stopped being concerned about what else is happening in the yard," said Camille Landry, president of FullScope Pest Control, with locations throughout north Houston, Texas.

"You have raccoons, possums, stray cats, and all of those are dropping flea eggs in your yard," Landry said. "You need to take the pet out of the equation

sometimes and be concerned with a preventive strategy."

Fleas only account for 1 to 2 percent of overall revenue at Dixie Exterminators in Marietta, Ga. But when they're biting, customers call quick, said Cliff Pepper, the company's director of business development.

"Fleas and German cockroaches tend to be the 'crisis pests' outside of wildlife," he said. "When the calls come in, it's like, 'Oh, my God, what's happening?!' All of a sudden, they're getting bit or their dog or cat is going crazy. They want service and it's, 'How soon can you do it?'"

Doug Foster has noticed a slight increase in flea activity year after year.

"It's not like a hockey stick — it's almost like watching the stock market," said the owner of Columbus, Ind.-based Burt's Termite & Pest Control. "We noticed an uptick during Covid, and we are trying to figure that out. From talking to other PMPs across the country, when people were working from home, more of them were getting pets."

Foster also notices an increase with

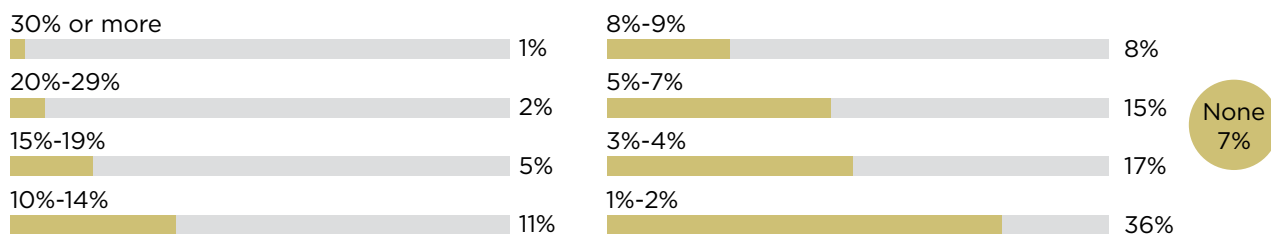
a growing market of Airbnb and Vrbo rentals popping up that are pet friendly. "We have a couple of hotels that call us whenever they have a guest with a pet," he said. "As soon as the room is vacated, we treat the room right after they vacuum as a proactive approach."

AT YOUR SERVICE. Ninety-five percent of survey respondents offer flea control services, and 51 percent sell it as a separate add-on that is not included with a general pest control program. Most (72 percent) charge \$299 or less for the service, with many pest management professionals (PMPs) we talked to providing a two-visit service to prevent callbacks.

Anecdotally, a majority say flea infestations in multi-family residences such as apartment buildings and other rentals are more frequent. "People from all walks of life and from all different backgrounds have a need for flea control," said Jim Regan. The technical adviser for Cowleys Pest Services in Farmingdale, N.J., points out: "Anything that's causing issues with biting is absolutely necessary to get rid of."

Revenue Figures

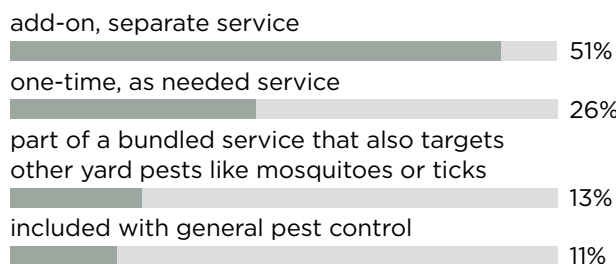
What percentage of your location's overall revenue came from flea control services in 2023?



Source: Readex Research; Number of respondents: 198

Flea Bundles?

How is flea control offered at your location?



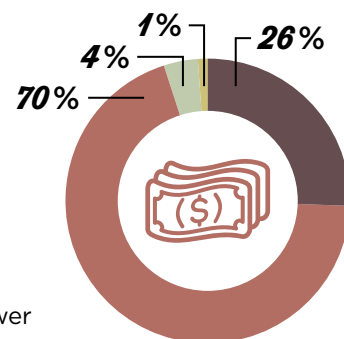
Source: Readex Research; Number of respondents: 198

Expectation Vs. Reality

Do you expect flea control revenue to increase, decrease or stay the same in the year ahead?

● increase ● same
● decrease ● no answer

Source: Readex Research; Number of respondents: 198



To Flea (Or Not to Flea)

Does your company location offer flea control services?

Source: Readex Research; Number of respondents: 209



Basically, fleas are small but mighty important to customers who are suffering the consequences. It's an essential service.

"We do have a specific, specialized plan so whenever someone calls in with a flea problem, we can propose a solution — and then anything else we find on the property, the technician can make recommendations and upsell additional services as needed," said Chad Highley, president, Environmental Pest Control, Lawton, Okla.

L.J. McCoy is director of field operations at Pest Professionals in Mission, Texas, just eight miles from the Mexico border. He says he noticed a bit of a rise in flea activity in early 2024 compared to last year.

"We had a mild winter and everything started sooner," McCoy said. "Our first flea job was in the middle of February."

A FINE TIME. Many report early spring and late summer flea activity as being more prevalent than other times of the year.

Foster sees a tie-in with popular vacation times. "If people board their animals, they can end up introducing fleas back into the house," he said, noting that not all pet owners are forthcoming about adhering to veterinarian-prescribed or over-the-counter flea preventives.

In some cases, a house that may have had some flea activity and has been empty during vacation will have fleas that

essentially go dormant. Vibration from movement upon return from a trip stirs up the hungry buggers. The family dog is then a four-legged smorgasbord.

Or, the family waits to pick up an animal for a couple days after returning home.

Then, the people are the prey, triggering an immediate call to a pest provider, Foster said. "All of a sudden, the first person who enters the house is dinner," he said.

Fleas bite.

And in this report, PMPs share treatment protocols, callback encounters, revenue gains and common species encountered on the job. 🐾

Flea TRIGGERS

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Pets aren't *always* responsible for inviting fleas into the home. PMPs share common culprits and why wildlife capture supports flea control.

Fido and Whiskers are often the first flea-carrying suspects homeowners point to when they realize the irritating bites they're reaching to itch, mostly on lower extremities, are from

dreaded fleas.

In many ways, fleas are to pet owners what lice are to parents of young children. The mere thought makes you crawl out of your skin.

Certainly, pets contribute to household

flea issues when owners do not adhere to consistent, recommended prevention prescribed by a veterinarian. Plenty tell their pest control companies, "Yep. We made sure Barker Jr. took his meds."

They even may give reassurance when

they call you back after a flea treatment because the problem persists: “Yes, we went to the vet.”

That’s when L.J. McCoy, Pest Professionals in Mission, Texas, wants to know, what did the vet prescribe?

If he gets the stammering reply, “Let me see what they used. ... I don’t have a receipt,” the answer is clear. The pet is still a carrier and no preventive pet services were rendered.

But far beyond the pet is literally a wild range of flea-sporting rodents, Procyonidae and Scuriidae — mice, rats, racoons and squirrels — along with the casual possum, vole, bothersome chipmunks chipping away at a home’s foundation and even adorable rabbits living under the deck.

Mice and rats carry fleas into the home. Stray cats traversing a property also can drop flea eggs in the yard that are transferred indoors by smaller creatures that sneak in through cracks.

Jeffery Preece, owner of ZipZap Termite & Pest Control in Lawson, Mo., services clients in rural areas near its headquarters along with more urban environments in Kansas City.

Here, Preece and other PMPs who responded to our 2024 State of the Flea Control Market survey share common flea culprits — aside from four-legged family members.

STUCK! Attics and chimneys offer easy-to-access shelter for animals like racoons

— and every animal has a life cycle. Preece has witnessed flea situations where the root cause is an expired animal in an area of the home where no one usually goes or really thinks about all that much. “Once the raccoon dies, the fleas start looking for another food source, and if they’re already in the house, [the owner is] probably next,” he said.

Crawlspaces underneath pier-and-beam foundations are target spots for wildlife to home in on and fleas to fester, says Camille Landry, president, FullScope Pest Control.

“When our technicians go out for a flea service, they look for openings, animal droppings and wildlife activity,” Landry said. “Then we have a secondary problem: We need to do an exclusion to reduce the wildlife population and control the fleas.”

Chad Highley added, “Crawlspaces offer ideal conditions because there is no plant life and there is nothing to obstruct fleas from jumping and they like places with low to no groundcover.” The president of Environmental Pest Control in Lawton, Okla., finds “a whole menagerie of critters” that appreciate these harborage areas and bring the fleas with them.

WELCOME IN! Landry generally treats fleas in residential environments, but some commercial hotspots include mechanics’ shops when garage bays are left open (the same applies to homes) and mobile homes that are converted into offices. “They prob-

ably already had an infestation,” she said.

Homeowners who purchase a house or move into a rental property may discover after the fact that fleas also are taking up residence.

“We talk to customers to really understand what’s going on,” Landry says. “Do you have pets? Did you just move in? When did you start noticing the problem? Garages are a big deal. People don’t think about leaving their doors open, and then their cat might walk into the garage and pick up the eggs.”

Mostly, humans and pets bring in fleas from the outdoors. So, the yard is a key treatment target, Landry said. “If you are in the yard and they are on your shoes, you probably won’t notice and walk indoors.”

YARD ALERT. Fleas aren’t big fans of moisture, so when the grass is lush, they’ll find another hangout. McCoy said, “bald spots in the lawn where it’s just dirt, the fleas love that. They also gravitate toward mulch, wood piles and wood shavings.”

He advises clients to maintain their properties and “keep things neat and tidy,” along with watching out to see which wild creatures pay a visit.

Highley notes that high traffic times for fleas include early spring and late summer when rodents are on the move. “In spring, rodents are moving out of their overwintering spots to find harborage or breeding grounds outdoors, and in late summer, they are getting ready for winter so they are on the move looking for a cold-weather hangout,” he said.

Before providing service to treat fleas, Landry often will inquire whether the lawn has been recently mowed.

“And if we are in a dry season, we suggest putting out a sprinkler to get moisture in the soil to help with exterior [flea] control,” she said, citing adverse environments for fleas. In Cowleys Pest Services’ New Jersey region, Technical Advisor Jim Regan said shore towns are “hit very heavy” because of sandier soils. “Fleas are a bit more present,” he says. 🐾

It's the Season

When temperatures hit 70 degrees Fahrenheit and higher, “that’s when fleas take off,” said Jim Regan, technical adviser, Cowleys Pest Services, Farmingdale, N.J. Once they drop into the lower 40s, activity dies down. “Over the last few years as temperatures have warmed up across the country, as a whole we’ve been seeing fleas come as early as March [in New Jersey] and hanging around sometimes through December,” Regan said. “Weather conditions are excellent and the phones ring off the hook.”

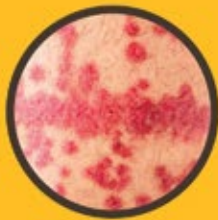
PROACTIVELY PROTECTING AGAINST FLEAS

IN 2024



Fleas are always a problem, especially in the summer months, when temperatures across many regions rise. However, pest control companies should plan for even more flea calls this year. The mild winter and early spring have set the stage for a significant increase in flea populations. This potential surge poses a serious threat to both pets and humans, making effective flea prevention and control more critical than ever. Read on for information about how to protect your customers from the looming flea threat.

FLEA IMPACT ON PETS AND HUMANS



Make sure your customers know that signs of a flea infestation on their pet include compulsive scratching or chewing, which can lead to skin irritation and hair loss. Early detection is critical, and fleas can often be found by looking closely at a pet's fur for tiny, moving brown spots. If left untreated, fleas can cause severe health issues, including skin allergies and transmission of other parasites like tapeworms.

Fleas don't just target pets. Humans can also be affected, particularly in environments with flea infestations. Fleabites on humans typically appear as small red spots around the feet, ankles, or legs, but can spread across the body if not addressed. Individuals with hairy legs, chests, and arms are more susceptible. Reactions to fleabites can include hives, rashes, or secondary infections from scratching. Severe allergies might lead to swelling, nausea, or breathing difficulties.

TIPS TO PREVENT FLEAS



For households with pets, focus on areas where animals spend the most time, such as living rooms, bedrooms, and carpeted spaces.



Regular cleaning of these areas can help prevent a minor flea problem from becoming a major infestation.



Outdoors, fleas prefer shady areas with ample coverage like porches, trees, garden sheds, and around kennels and dog houses. Make sure customers know to check pets for fleas after they've been outside or around other animals.



To control fleas, it's essential to stop their reproduction cycle. That's where Zoëcon® Professional Products and our line of Precor® products can help.

Given the potential flea surge, comprehensive and effective flea control solutions are essential.

As the originators of insect growth regulator (IGR) technology, Zoëcon® Professional Products offer advanced solutions to provide long-lasting protection and prevent reinfestations.

The Precor® family of products, powered by the insect growth regulator (IGR) (S)-methoprene, are designed to protect both people and pets from fleas, with up to seven months of protection against flea emergence.



PRECOR® PRODUCTS

- Provide powerful and effective control.
- Effective against all stages of the flea life cycle, ensuring comprehensive control.
- Developed by the original experts behind the insect growth regulator (IGR), (S)-methoprene.
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- Long-lasting control of up to seven months against future flea infestations, reducing the need for additional treatments.
- Offer the ability to do more with less, optimizing efficiency and reducing callbacks for pest control professionals.
- Available in various formulations (sprays, concentrates, foggers) suitable for different environments and needs.



When treating flea infestations, using proven formulations with confidence will be critical for customers and professionals alike. Visit zoëcon.com for more information on protecting customers from fleas and about our advanced IGR solutions.



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Cover ALL BASES

A multifaceted treatment and prevention approach yields the greatest success when fighting fleas.

Worried about biters? That's what Jeffrey Preece and ZipZap Termite & Pest Control technicians ask customers who call in for flea treatment or other in-the-news disease-carrying vectors such as mosquitoes and ticks. The Lawson, Mo.-based company created a specialized program called Bye, Bye Biters to address this trifecta.

"People may not want a general pest control program, but they are concerned about these pests," Preece said, noting that about 15 percent of his customer base chooses just this program.

"People are more educated about disease-carrying insects and they want to spend more time outside, so the 'biting' program has helped us increase our revenues, and it's been a good program for

our customers," Preece said.

If someone calls for flea treatment as a stand-alone, there's one fee. If a homeowner subscribes to the biters program, treatments for all three pests are included and extra services are included at no extra cost. "A lot of people like that," Preece said.

Also, Preece added flea control into some of the company's other programs — basically grouped by number of pests treated. "We have seen an increase in demand for that because people might get sticker shock on what it takes to treat fleas after they've already spent money trying to get rid of them and still have them," he said.

Across the board, pest management professionals (PMPs) who participated in our annual State of the Flea Control Market survey say that building in a follow-up visit to flea-only programs reduces

callbacks. L.J. McCoy at Pest Professionals in Mission, Texas, said follow-up occurs 10 to 14 days after the first treatment, which includes a combination of residuals and insect growth regulators (IRGs).

Across the board, a combination treatment protocol reigns supreme with 86 percent of respondents reporting they used general use insecticides with IGRs.

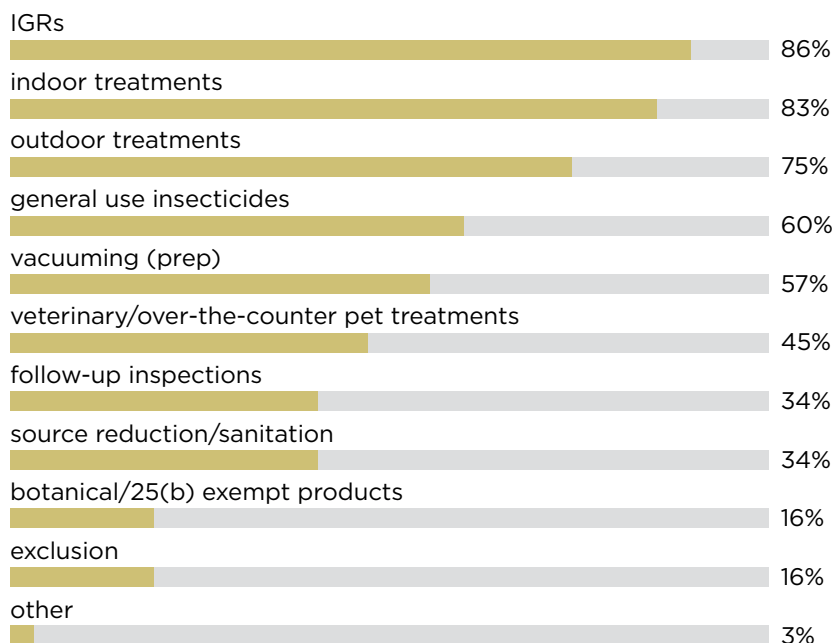
1-2 PUNCH. Chad Highley follows "the rule of twos." It goes like this: "After we perform a service, we advise customers to wait two days, then vacuum every two days for two weeks. That is very effective."

Highley's company, Environmental Pest Control in Lawton, Okla., believes in a protocol that combines a strong adulticide — and a follow-up visit 10 days after treatment.

Generally, PMPs say a double treatment for single-service flea treatments produces the best knockdown and future prevention.

Program Protocol

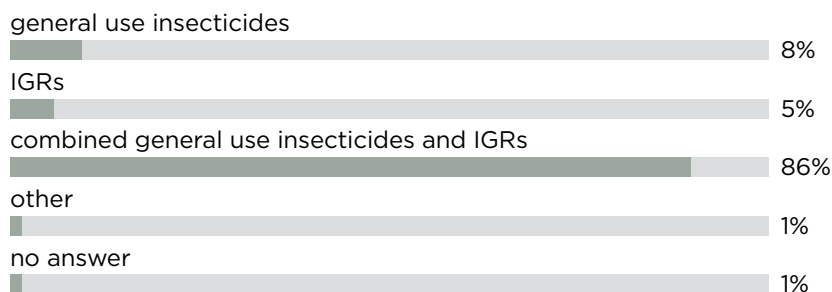
Which service protocols are included in your location's flea control programs?



Source: Readex Research; Number of respondents: 198; Respondents could select multiple answers

Primary Purpose

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



Source: Readex Research; Number of respondents: 198

Cliff Pepper, director of business development for Dixie Exterminators in Marietta, Ga., said the company will not offer a one-time flea control service. "This is not a one-and-done approach," he said. "If you want complete extermination of fleas, we are not going to promote in any way that this can be done in a single service and solve the problem."

Instead, Dixie Extermination sends out a technician for an assessment. The

potential customer can sign a monthly pest control agreement and receive service for all general pest services, including the flea control follow-ups without additional cost. Once under control, the client can transition to quarterly service.

The contract is a one-year agreement and can be canceled at any time — but usually isn't.

"Once the technician and customer agree the problem is addressed, that's when

we switch them to quarterly and hopefully they stay on forever," Pepper said.

GET SMART. As with any pest management problem, educating customers on their role in the solution is key. And there's no control over compliance. They're all in, or really not. Conversations often center around vacuuming, yard care, pet protection with veterinarian prescriptions and keeping an eye on wildlife crossing into the property.

"I let people know, if you don't get your pet treated, everything we are doing will be null and void within 10 days and then you'll be mad at me," McCoy said.

McCoy often recommends trap-and-release services his company offers because wildlife is a main conduit for introducing fleas to the outdoors, which pets and people then transfer inside. The situation can exacerbate quickly.

When Doug Foster walks into a flea infestation, his Columbus, Ind.-based Burt's Termite & Pest Control technicians will ask homeowners to ideally leave the property for three or four hours. "We don't want them tracking across the carpet and lawns, slipping on any material or transferring fleas," he said.

Education includes frequent vacuuming, disposing of or cleaning pet beds and houses, and cleaning anywhere pets go. "We remind people, cats often climb on countertops or on the tops of cabinets," Foster said.

Fifty-seven percent of survey respondents incorporate vacuuming as a prep treatment before applying general use insecticides and IGRs. Thirty-four percent stand by follow-up inspections, with 16 percent advising inclusion services to prevent wildlife transfer of fleas to properties.

Many customers are willing to comply because fleas are a scratch they don't want to itch.

McCoy said even though general pest control programs might be a more difficult sell given homeowners' current economic circumstances, if fleas are the issue, "they are willing [to sign up for service]." 🐾

Flea QUIRKS



Share these fun facts about fleas with customers to encourage their involvement in getting rid of the pests.

We see (and feel) the adult fleas. But what about those tiny, worm-like flea larvae that are also equipped to chew? All stages enjoy noshing on not just pets and other “blood donors” but also flea feces, larvae, dander, pet hair, leftover pet food trickled on the kitchen floor and droppings from wildlife.

Fleas experience a complete metamorphosis. (Usually, this word is associated with monarch butterflies. Not this time.)

Customers might be interested in learning these important control insights and facts to inspire preventive measures at home.

- Dog fleas serve as an intermediate host for dog tapeworm.
- Fleas defecate drops of blood while feeding that look like dry flakes of black pepper that remain on fur until an animal moves, stretches or rolls against another surface.
- In the wild (backyard), fleas are found in low and dry nesting materials.
- A female cat flea can produce more than 2,000 eggs during a lifetime.
- Certain areas have seen an increase in calls for flea services despite the use of veterinary products due to lack of preventive outdoor controls.
- Common places fleas are found: yards, attics, crawlspaces, chimneys. 🐜

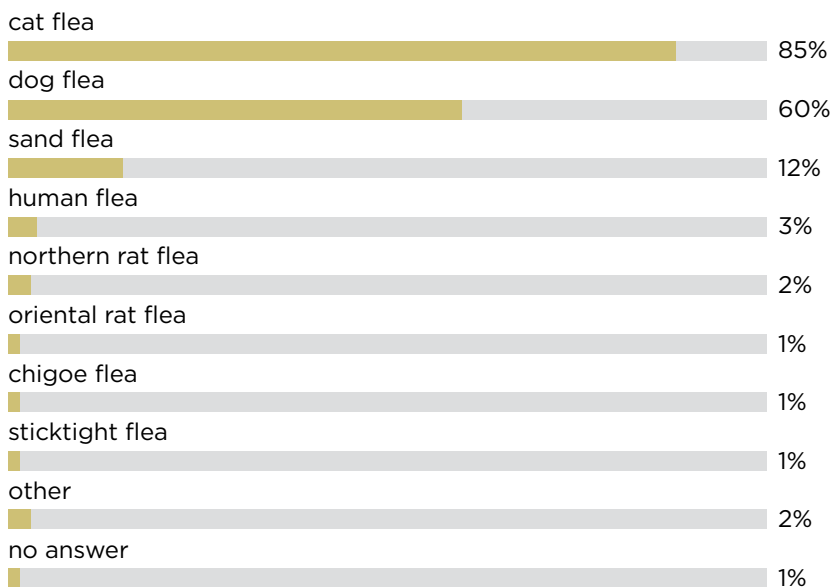
Source — “PCT Field Guide to Stinging & Biting Arthropods”

About The Survey

The PCT 2024 State of the Flea Control Market survey was sponsored by Zoëcon/Central Life Sciences and compiled by Readex Research, a privately held research firm in Stillwater, Minn. A sample of 8,443 pest control company owners, executives, technical directors, general managers and managers was systematically selected from the PCT database. Data was collected from 209 respondents — a 2.5 percent response rate — via online survey from March 13-27, 2024. The margin of error for percentages based on the 198 respondents whose company location provides flea control services is 6.9 percentage points at the 95 percent confidence level. Charts may not add up to 100 percent due to rounding.

Flea Species

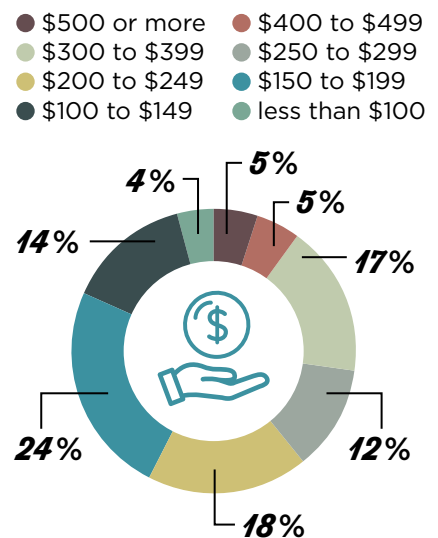
What flea species are common in your market area?



Source: Readex Research; Number of respondents: 198; Respondents could select multiple answers

Service Charge

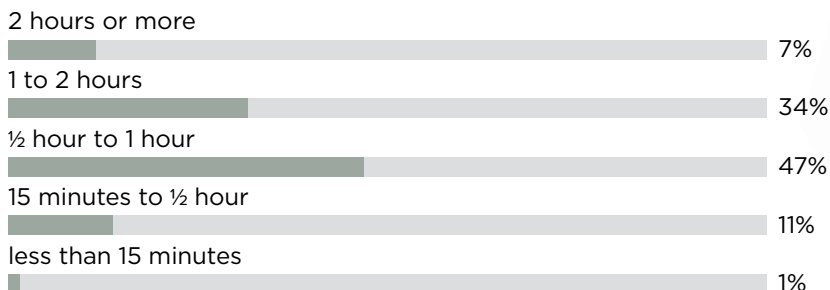
How much does your location charge for a typical residential flea control service job?



Source: Readex Research; Number of respondents: 195

Time Out

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



Source: Readex Research; Number of respondents: 195





FLEA, FI, FO, FUM




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