

Inside Quality Control from the Outside In • Pests by the Dozen
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State of the **OUTDOORS** MARKET Report

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Quality Control from the OUTSIDE IN

Outdoor pest control has become one of the most important pillars of the pest management industry. What was once considered a supporting service that was applied around the perimeter before stepping inside has now taken center stage. Many companies are building entire programs around the idea that the most effective way to control pests is to stop them before they ever cross the threshold.

“One-time pest control isn’t a cure-all — it’s just a treatment for a specific problem,” said Jeff Preece, owner, ZipZap Termite & Pest Control, Lawson, Mo. “We’ll do one-time pest control, but we believe in the philosophy that pest control is a process. You’re managing the pests outside so that you don’t have to go inside unless there’s a problem.”

It’s a shift rooted in a simple truth: Most pest problems start outside, so treating them at the source is more efficient, more predictable and, in many cases, more appealing to today’s homeowners and property managers.

The second annual PCT State of the Outdoors Market report, sponsored by Zoëcon, takes a closer look at the ongoing changes driving outdoor-focused services. From evolving technologies and marketing strategies to the importance of looking beyond the perimeter, this report outlines trends in the industry as PMPs move forward into the future.

OUTDOOR IS HERE TO STAY. While indoor services always will be available on an as-needed basis, outdoor-only services are climbing: 23% of survey respondents report that more than half of their residential accounts are now handled entirely outdoors, without ever entering the home.

That may be, in part, because pest management professionals (PMPs) are servicing homes over multiple times a year across all four seasons. Frequency has become the norm, with 81% of companies performing outdoor treatments at least monthly. Of those, most (54%) report performing quarterly services.

The western U.S. leads the shift toward exterior-only services, with 43% of respondents reporting that a majority of their residential accounts never require indoor access. Other regions are lower, with the South at 21%, the Midwest at 17% and the Northeast at 12%.

“Almost 80% of the problems we deal with, we handle from the outside,” said Dallas Whitt, owner, Critical Hit Pest Management, Shawnee, Okla. “The other 20% are interior services we offer as a bonus.”

TIME MANAGEMENT. Nearly 75% said they perform outdoor services for residential accounts at nearly every appointment all year long. But residents aren’t the only ones reaping the rewards. Although 95% of PMPs provide residential services, 88% also handle commercial clients.

Nearly half serve government and academic accounts. Another 39% serve institutional clients. There’s a lot to go around, and that’s what makes outdoor-only services prime for growth.

“Outdoor-only services are a route builder,” said Preece. “Our guys are able to do between 12 and 17 jobs outside because we route them so tightly. They can get in and out of there and do a fantastic job without having to worry about waiting around for the customer.”

Out of those PMPs surveyed, 39% say more than half of their total revenue comes from outdoor-only pest services, with 3% of respondents saying that 100% of their revenue is generated on outdoor alone.

CHANGING PHILOSOPHIES. A shift in industry philosophy is emerging, with 62% of respondents expecting revenue from outdoor-only services to increase in 2026. A change in how pest professionals are thinking about their pest management approach is largely what’s driving that shift.

“There’s a broader question I don’t necessarily have an answer for that I think we should be asking,” said Billy Olesen, CEO, PestStop, Olympia, Wash. “Should we as an industry be out there just treating everything, or do we need to be more calculated in where we’re applying insecticides, miticides and other treatments?”

Scott Ballard, CEO, Ballard Pest Management, Opelika, Ala., also has seen a push for the great outdoors coming from other large national pest control firms. In January, he acquired a smaller company whose clients were conditioned to want outdoor-only services, too. Seeing the interest pique on all sides has inspired Ballard to take a similar approach.

“We’re offering outdoor services now more than we have ever offered it before because it’s being offered in our area and we’ve got a lot of people that are requesting it,” he said.

Whitt said Critical Hit Pest Management stands firmly in the middle, wanting to focus more on outdoor-only services but seeing benefit in bundling indoor and outdoor together. Taking that combined approach allows him long-term customer retention.

“I would like to roll all my services over to outside only, but that engagement piece is so important in the industry when it comes to retaining customers,” he said. “Taking a look at the inside, even if we’re not treating anything, allows us another opportunity to engage with the customer and set them up for future services.”

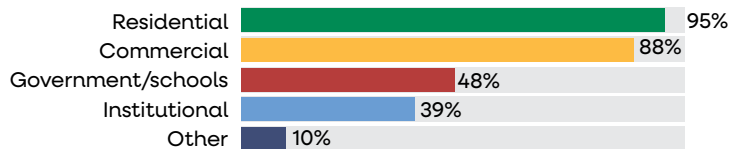
The numbers seem to agree, with 42%

of survey respondents saying they perform interior as part of their contracted service and 49% saying they do so as-needed.

“I do believe exterior services are going to increase over time,” said Whitt. “I see a lot of customers wanting to us to handle more things on the outside, but I leave that door open for them in case they find benefit from it.” ●

NEIGHBORHOOD WATCH

For which types of accounts do you provide outdoor/perimeter/exterior pest control services?



Source: Readex Research; Number of respondents: 170



TIME COMMITMENT

For residential accounts, how frequently do you perform outside-the-home/perimeter treatments?



At least monthly 81%

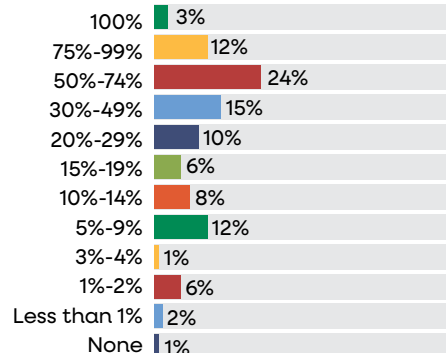
YEARLY 2%
TWICE YEARLY 10%
QUARTERLY 54%
MONTHLY 14%

MORE THAN MONTHLY 3%
OTHER 16%

Source: Readex Research; Number of respondents: 162

MONEY MATTERS

What percentage of your overall revenue is derived from outdoor-only pest control services?



Source: Readex Research; Number of respondents: 170





PESTS by the DOZENS

Pests tend to stay relatively consistent over the years, with familiar culprits like ants, spiders and rodents continuing to drive a majority of service calls. What does change, however, is the intensity and timing of those issues. It's up to PMPs to pivot and embrace creative paths forward as insects come and go across regions.

TARGET ACQUIRED. Pest pressures change based on weather patterns, environmental conditions and more. Just look at spotted lanternflies, an invasive species continuing to spread at alarming rates and wreaking havoc on trees and vegetation.

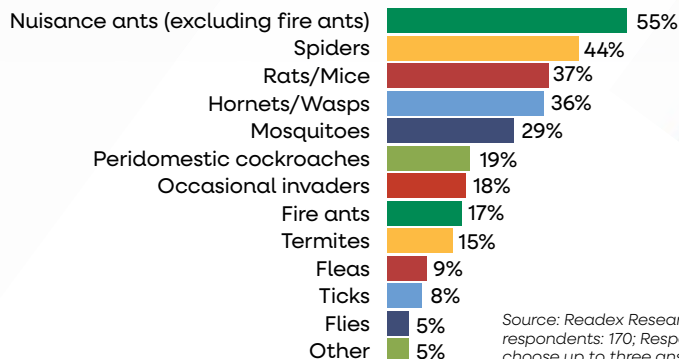
“We need to do more research on spotted lanternflies,” said Kevin Hathorne, technical director, Terminix Service, Columbia, S.C. “Because they feed on fruit and trees, we can only deal with them whenever they become a real problem — when there’s an influx of them landing and resting on a house and coming indoors.”

It's ticks, though, that capture Hathorne's attention at the moment. According to this year's survey, only 8% of PMPs say ticks generate service calls — but tick-related illnesses continue to climb across the country. This divide suggests it's a problem best solved before it ever begins.



PROBLEM PESTS

What are the top three outdoor pests that generate the most service calls in your market area?



Source: Readex Research; Number of respondents: 170; Respondents could choose up to three answers.

“There’s definitely been an increase in people inquiring about targeted tick treatments,” said Hathorne. “We have an add-on service where we target prone areas in the yard that have shade, like woodlines, high weeds and overgrown grass. And we also educate customers on good, quality lawn maintenance.”

Survey respondents say termites generate 15% of service calls — a number that should be much higher, according to Critical Hit’s Whitt. “There are two types of homes there — those that have termites and those that get termites,” said Whitt. “Termite control is the No. 1 most overlooked outdoor-indoor service.”

Standing water and excess moisture attract and sustain termites. Whitt advises homeowners to pull mulch away from the home and stay proactive with maintenance between treatments.

BY THE BOOK. As long as there are pests, there will always be a need for outdoor pest control services. While PMPs may not be able to eliminate them all, they can target high-traffic areas and mitigate future disasters by helping homeowners learn what to do between treatments.

“Explaining the why, the when and how it affects them in positive and

negative ways is the most important thing you can do for someone,” said Ballard Pest Management’s Scott Ballard. “Pest control is knowing the bug you’re going up against, understanding it and knowing how to control it.”

In Alabama and Georgia, where his company operates, Ballard said ticks — along with fleas and mosquitoes — all generate service requests.

“I get customers all the time who say, ‘I don’t want mosquito service because my neighbors do mosquito service,’” said Ballard. “But they’re still going to get bit by mosquitoes. And when they do, we’ll be there to help them out.” ●

The Heat is On

Stay Cool—and Ahead of Pests

For over 50 years, technicians have trusted Zoëcon® Professional Products to help them stay cool under peak summer pest pressures with brands like Altosid®, Precor®, and Essentria® products. Altosid® products have been utilized by mosquito abatement districts, military programs, and pest control operators alike to effectively target larval populations of mosquitoes before they become biting adults. For botanical, residual control, Essentria® products have been the go-to solution, while the latest Precor® formulation brings the power of Precor® products to outdoor barrier treatments.

Stay ahead with proactive inspections, updated monitoring, and treatment strategies built on legacy and backed by science. See how to maximize this summer's potential with IGRs, adulticides, botanicals and more from Zoecon.

Pest Activity Heats Up

Summer doesn't slow pests down — it accelerates them. Warm temperatures and rising humidity create ideal conditions for faster development, larger populations, and longer activity windows.

Unlike early spring, when populations are just getting started, midsummer pest pressure is already compounding. A missed breeding site or delayed inspection in June can turn into a callback in July. Mistakes made now don't stay contained, they multiply with the season.

*Don't sweat
playing catch
up with
summer pests*

Controlling the Triple Threat

Fleas, ticks, and mosquitoes are defining the outdoor season in 2026.

They breed quickly, respond aggressively to moisture, and create relentless pressure for both technicians and homeowners. Not only are they a nuisance, but their presence also raises concerns about exposure to disease risk.

Fleas are often the clearest indicator that outdoor pressure is fully established. Populations thrive in protected environments like leaf litter, crawl spaces, and shaded areas around

structures. In the heat of summer, populations can expand rapidly, especially on properties where pets or wildlife are present. Timely intervention is critical. Incorporating a solution like **Precor® Outdoor F-T-M** into your treatment program helps interrupt the life cycle before populations can establish indoors. This micro-encapsulated formulation combines the adulticidal power of tau-fluvalinate with the long-lasting control of (S)-methoprene and prevents the emergence of adult fleas outdoors for up to eight weeks.

Ticks follow a similar pattern but bring added risk due to their role as disease vectors. Moist areas, including mulch beds, tall grass, and shaded perimeter zones, create ideal conditions for activity.

Peak summer conditions mean technicians should expect aggressive host-seeking behavior to remain elevated through the season. Targeted perimeter and harborage treatments are essential to reduce exposure and limit population expansion.

Mosquitoes present a different challenge. With temperatures at their peak, development accelerates — standing water in clogged gutters, low-lying areas, and artificial containers can produce a new generation in as few as seven to ten days. Maintaining consistent larval control throughout the summer, especially at hard-to-reach standing water sites, is key to preventing rapid population growth from outpacing your program.



Where to Look First

If you're trying to get ahead of emerging insect activity, focus on these key inspection zones:

- ✓ Garages
- ✓ Basements and crawl spaces
- ✓ Covered outdoor furniture
- ✓ Pool enclosures
- ✓ Eaves, soffits, voids
- ✓ Yard debris, mulch beds, early garden zones

Summer brings out a wide range of pests. But if you're prioritizing where to act first, fleas, ticks and mosquitoes should be at the top of your list.



Altosid® Briquets

Altosid® Briquets are a strong early intervention solution, designed to stop larval development in active mosquito breeding sites for up to 30 days of control.



Essentria® Mosquito & Tick Concentrate

For control of adult mosquitoes, **Essentria® Mosquito & Tick Concentrate** provides a strong option for outdoor treatments, particularly in environments where botanical or reduced-risk approaches are preferred. This hard-hitting outdoor formula not only kills ticks and mosquitoes, but also **repels mosquitoes for up to 14 days.**



Altosid® Liquid Larvicide Mosquito Growth Regulator

Altosid® Liquid Larvicide Mosquito Growth Regulator is another larvicidal control solution that prevents the emergence of biting adult mosquitoes. It can also be used as a pretreatment on potential breeding sites.



Precor® Outdoor F-T-M

Precor® Outdoor F-T-M effectively targets fleas, ticks, mosquitoes, and a broad spectrum of labeled pests outdoors, with application approval in turf and ornamental settings.

Peak Season + Peak Products = Peak Profits



Visit Zoecon.com for more information on treatment solutions

Always read and follow label instructions. Altosid, Essentria, Precor, Zoecon and Zoecon with design are trademarks of Wellmark International. ©2026 Wellmark International





AROUND the CORNER

Treating the foundation has long been a cornerstone of pest control, but today's PMPs know it's only part of the equation. To truly prevent infestations, companies are looking beyond the perimeter to target other areas of the yard, its structures and surrounding environments where pest problems often originate.

"The majority of our treatments are up around the foundation of the home, but we've seen an increase in add-on services that target particularly prone areas in the yard," said Terminix Service's Kevin Hathorne.

LAY OF THE LAND. Those interviewed for State of the Outdoors Market Report said that in addition to treating a structure's foundation, they treat decks and

patios, pergolas, outdoor fireplaces, sheds, mailboxes, flower beds and gardens.

Respondents also noted that commonly overlooked treatment areas include gutters, fire pits, swimming pools, woodlines and play equipment. Woodlines, in particular, are a major problem with mosquitoes and other nuisance pests.

"The reason pests thrive out there is because there's a lot of shade and moisture," said ZipZap's Jeff Preece. "There are totally undisturbed nesting areas the farther you get from the house. So we target woodlines, tree bases, leaf litter, mulch buildup and fence lines."

Products change across locations, too. Sixty percent of survey respondents report using granular pesticides and bait to control outdoor pests. That number is so high largely because granular products become

more important the farther away you get from the foundation. Although 96% use liquids and sprays for outdoor services, Preece points out those become harder to use in more open areas where they run the risk of spreading downwind.

"We tend to use more granular bait applications farther out because they're going to have less of an effect on non-target organisms," said Hathorne. "We always want to reduce the effects on non-target organisms like birds and other species."

UNEARTH PROBLEM AREAS. It's not just about what's lingering at the edges. It's also about looking at the entire area from a pest's point of view. "We're so often worried about the house as our biggest single investment, that homeowners aren't always thinking about other things



not attached to the house,” said Ballard Pest Management’s Scott Ballard. “You’ve got to think like a bug.”

Three-quarters of respondents provide targeted yard treatments for fleas, ticks and other pests, but only 25% perform shrub, tree and ornamental treatments. When you’re thinking like a pest, you are looking for food sources, nesting areas and other creative ways to get indoors.

“Sometimes technicians are so focused on looking at the foundation for crawling insects that they forget to look up,” said PestStop’s Billy Olesen. “If carpenter ants are crawling on the power lines overhead, you’re never going to get control if you’re only treating the foundation.”

That mentality extends to the kinds of lighting clients use indoors and out.

“We’ve had car dealerships have big issues with bugs because they’ve got big, beautiful lights installed that are attracting them,” Olesen said. “You change those bulbs out, and you no longer have the same problem.” ●

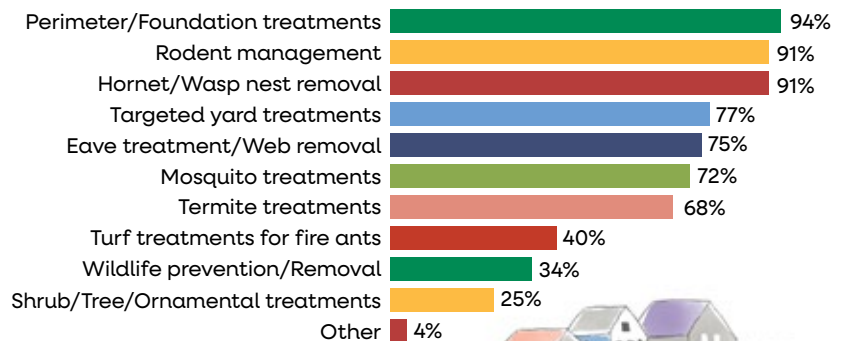


“The majority of our treatments are up around the foundation of the home, but we’ve seen an increase in add-on services that target particularly prone areas in the yard.”

— Kevin Hathorne, Terminix Service

MENU OPTIONS

For residential accounts, what types of outdoor pest control treatments do you provide for customers?

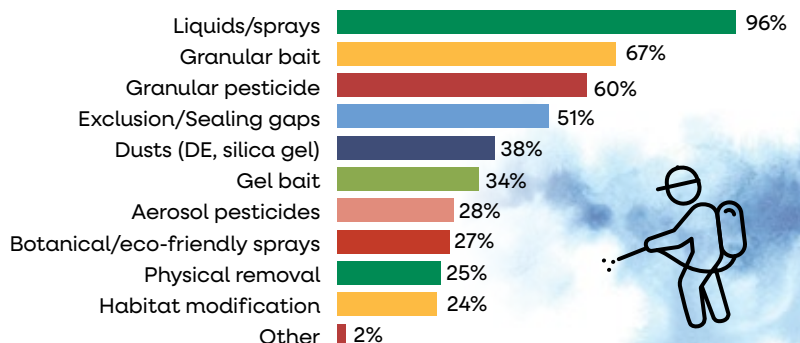


Source: Readex Research; Number of respondents: 162; Respondents could choose multiple answers.



KNOW YOUR WEAPONS

What types of products and tactics do you use to control outdoor pests?



Source: Readex Research; Number of respondents: 170; Respondents could choose multiple answers.





just have a blog. You need social media to intertwine with your marketing and tie everything together. People need to know how to get in touch with you.”

Olesen takes a slightly different approach. He uses ChatGPT, Gemini and NotebookLM to

FUTURE THINKING

According to this year’s State of the Outdoors Market Report, 59% of respondents say they never market outdoor services. And maybe they haven’t had to, given that homeowners tend to ask for them outright. But if the industry is going to see the expected increase in outdoor services this year, PMPs will need to think a bit differently about how they’re marketing to clients across generations.

When it comes to targeting different demographics, 32% of respondents say millennials are the most responsive to exterior-only marketing. Generation X is a close second at 27%. But all eyes are turning toward Gen Z. They’re the fastest growing group of first-time homebuyers, outpacing previous generations.

“Each generation has different value sets and different ideas about things,” said Terminix Service’s Kevin Hathorne. “To be successful, you have to market to each generation in a way that’s relatable.”

COMMUNICATION TIPS. Several PCOs interviewed for this report stressed that effective customer communication requires a balance between education and

reassurance — providing helpful technical information about prevention and best practices without creating unnecessary concern or alarm. Clear, proactive communication can help customers feel informed, confident and comfortable with the process.

“Our goal, if we’re doing our job correctly, is not to scare people into pest control services,” said PestStop’s Billy Olesen. “It’s to educate them as to what pests are in their area and give them a realistic idea of when’s the best time to treat them and what can be done.”

TECH BYTES. The ways PMPs are educating clients continue to evolve alongside technology.

ZipZap’s Jeff Preece publishes articles on his site two or three times a month. To date, he’s published upwards of 130 articles and uses Google Analytics to keep track of top performing stories. His son then shares them by scheduling posts across all their social media platforms throughout the month, on X, Pinterest, Facebook and more.

“You have to be smart with how you utilize technology,” said Preece. “You can’t

create a conversational AI-driven two-person podcast tailored specifically to the consumer’s needs. By running technical prep sheets, insect biology information and step-by-step instructions for maintenance through these different algorithms, Olesen can have the AI create a friendly conversation that’s both informative and entertaining while consistently upholding the company’s voice and brand values.

“You’d be surprised to find out it was AI having this conversation back and forth for five minutes, but it allows us to deliver information in a way that’s accessible for folks who enjoy technology,” said Olesen. “We want to be able to go out and do our jobs, but we also need to make sure that we’re communicating in a way that’s reasonable so that they’re getting the message.”

For others, like Ballard Pest Management’s Scott Ballard, old-school messaging has never gone out of style. Many still rely on word of mouth and continue to find success using the same techniques their predecessors used.

“My marketing is my trucks and my signs,” said Ballard. “I don’t really do a lot on Google yet because I don’t have to. As a Gen Xer, I’ve got kids who are millennials and I’ve got word-of-mouth from Baby Boomers. We’ve got a good balance.” ●

BORN THIS WAY

What customer demographic group is the most responsive to an exterior-only/perimeter sales and marketing message?



Baby Boomers
(born 1946-1964)

16%



Generation X
(born 1965-1980)

27%



Generation Z
(born 1997-2012)

15%



Millennials
(born 1981-1996)

32%



None of these
8%

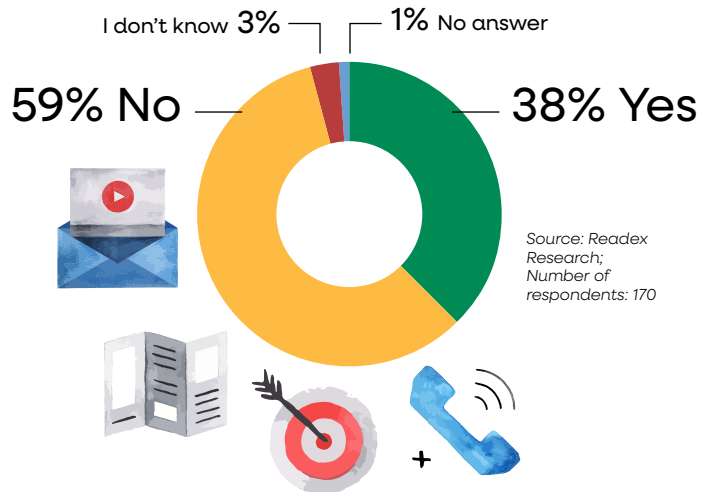


No answer
1%

Source: Readex Research; Number of respondents: 170

KNOCK KNOCK

Does your service location actively market its outdoor-only service?



About this Survey

The PCT 2026 State of the Outdoors 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 5,360 pest control company owners, partners, executives, presidents, technical directors and managers was systematically selected from the PCT database. Data was collected from 172 respondents — a 3% response rate — via online survey from March 3 to March 23, 2026. To best represent the audience of interest, the majority of results are based on the 170 respondents whose company location provides outdoor pest control services. The margin of error for percentages based on these 170 usable responses is plus or minus 7.5% percentage points at the 95% confidence level. Charts may not add up to 100% due to rounding.



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— Billy Olesen, PestStop

ZERO IN ON OUTDOOR PESTS

ZOËCON® PROFESSIONAL PRODUCTS DO THE REST



ZERO IN ON BREEDING SITES WITH RESIDUAL CONTROL



Prevent adult mosquito emergence with the insect growth regulator (IGR) (S)-methoprene featured in **Altosid® Liquid Mosquito Growth Regulator** and **Altosid® Briquets**.



Essentria® Mosquito & Tick Concentrate kills and repels mosquitoes for up to 14 days and kills ticks using an essential-oil based, FIFRA 25(b) insecticide.



Precor® Outdoor F-T-M combines tau-fluvalinate with our pioneering IGR, (S)-methoprene, to target fleas, ticks, mosquitoes, and more.



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