**Exterminating and Pest Control Services 2022**

**Business Is Good Because Pests Are Bad**

Pests don’t care about the pandemic, which is why *Pest Management Professional*’s 2022 State of the Industry survey (conducted during November 2021) reports 67% of contractors expect their 2022 revenues to increase at least 10% and 15% more than 26%.

With more consumers working from home or working a hybrid schedule, they are more likely to notice pests. Many business locations have been closed or operating partially, which requires pest-control inspections and services before re-opening and employees returning.

The February 2022 William Blair/PCO M&A Specialists Pest Index increased 19.7% YOY, with the various index segments also increasing YOY: the residential index by 23%, the commercial index by 19%, the termite index by 18% and the bed bug index by 17%.

**Pest Control Companies’ Projected Top 2022**

**Challenges and Opportunities, July/August 2021**

|  |  |
| --- | --- |
| Top Challenges | Top Opportunities |
| #1: Hiring and training | #1: Increasing referrals |
| #2: General economy | #2: Increasing repeat business |
| #3: Lowball competitors | #3: Improving customer retention |
| #4: Fuel costs | #4: Upselling services |
| #5: Pandemic restrictions | #5: Increasing prices |

 *Pest Management Professional*, November 2021

**Protecting Homes and Homelife from Termites**

Although estimates are not exact, the most-reliable data reveals approximately 600,000 homes in the US are damaged by termites annually and the total cost, including crops, is approximately $30 billion.

Termites are always ready to make their home in any property. The October/November 2021 survey for the *PCT (Pest Control Technology)* State of the Termite Market Report found 64% of pest control companies expected their 2022 revenues to increase.

34% said their termite control business was a more significant revenue source than five years ago (12% more significant and 22% somewhat more significant) and calls for termite control services increased by 49% from 2020.

**Types of Termite Control Services Offered by Survey Respondents of**

**the State of the Termite Market Report, October/November 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Service | Percent | Service | Percent |
| #1: Termite renewals (re-inspection) | 88% | #5:Inspection or “monitoring only | 50% |
| #2: Post-construction termite treatments | 87% | #6: Termite exclusion  | 22% |
| #3: Pre-construction termite treatments | 74% | #7: Fumigation | 12% |
| #4:Borate wood treatments | 62% | #8: Other | 7% |

*PCT (Pest Control Technology)*, February 2022

**Rodent Control Is a Revenue Generator**

Comparing 2014 and 2021 data in the *PCT (Pest Control Technology)* 2021 State of the Rodent Market Report reveals 20.3% of the survey respondents (July 2021) said they were deriving revenues from rodent control services while 14.6% were during 2014.

Of the 2021 survey respondents, 67% said residential rodent control was generating the most revenues, with commercial non-food second at 16% and commercial: food at 14%. Almost half (48%) agreed the rodent population was more visible in their market areas.

An indication of the rodent problem is the 34% of 2021 survey respondents who said there was no seasonal difference as to when their businesses were busiest providing rodent control services, compared to 21% in the 2014 survey.

**Non-Toxic Rodent Control Products Used by Survey Respondents**

**of the State of the Rodent Market Report Survey, July 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Product | Percent | Product | Percent |
| #1: Traps | 83% | #4: Monitoring non-toxic bait | 22% |
| #2: Exclusion | 75% | #5: Repellents | 14% |
| #3: Glueboards | 47% | #6: Other | 6% |

*PCT (Pest Control Technology)*, December 2021

**Bed Bugs Are Still a Bugaboo**

According to the *PCT (Pest Control Technology)* 2021 State of the Bed bug Control Market Report, the pandemic had little effect on this service for many pest control companies. Some said there was increased activity at medical facilities serving as vaccination centers.

The August 2021 survey found 52% of respondents expected increased bed bug revenues during the next year, compared to 42% in the 2020 survey and 59% in the 2019 survey.

The pandemic had a definite negative effect on the commercial bed bug sector, as reported by 44% of survey respondents, especially because many hotels and other leisure & hospitality properties were operating at very reduced capacities.

**Sources of Bed Bug Control Revenues, 2020, 2019 and 2018**

|  |  |  |  |
| --- | --- | --- | --- |
| Source | 2020 | 2019 | 2018 |
| Single-family homes | * 48%
 | * 43%
 | * 43%
 |
| Apartments/Multifamily housing | * 40%
 | * 39%
 | * 39%
 |
| Hospitality industry | * 5%
 | * 8%
 | * 8%
 |
| Hospitals/Healthcare facilities | * 4%
 | * 2%
 | * 3%
 |
| Schools/Colleges/Universities | * 1%
 | * 2%
 | * 1%
 |
| Transitional housing | * 0%
 | * 2%
 | * 1%
 |
| Businesses/Offices | * 0%
 | * 1%
 | * 1%
 |
| None/Equal mix | * 0%
 | * 1%
 | * 2%
 |
| Other | * 1%
 | * 1%
 | * 0%
 |

 *PCT (Pest Control Technology)*, November 2021

**Identifying Pest Control Customers**

Analysis of data from five representative 2021 consumer/market surveys conducted by The Media Audit shows adults 18+ who are planning pest control services during the next 12 months at an average age of 42.9 years and an average household income of $79,200.

Unsurprisingly, younger adults over-indexed, on average, for pest control services, since they have been buying homes: Gen Zers at 108 and Millennials at 136, Gen Xers at 110. Older adults under-index on average: Baby Boomers at 62 and Silent Generation at 43.

**Indices of Adults 18+ Who Are Planning Pest Control Services During the**

**Next 12 Months by Their Homes’ Market Value, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Market Value | West Palm Beach, FL | Southern New Hampshire\* | Chicago | Austin | Seattle-Tacoma |
| $100,000–$199,999 | * 57
 | * 84
 | * 60
 | * 163
 | 188 |
| $200,000–$299,999 | * 154
 | * 120
 | * 72
 | * 83
 | * 127
 |
| $300,000–$399,999 | * 102
 | * 137
 | * 130
 | * 131
 | * 104
 |
| $400,000–$499,999 | * 111
 | * 94
 | * 94
 | * 117
 | * 90
 |
| $500,000–$999,999 | 148 | * 202
 | * 102
 | * 111
 | * 97
 |
| $1 million or more | * 139
 | * †
 | * 117
 | * 82
 | * 156
 |

Based on The Media Audit’s 2021 surveys

\*Belknap, Cheshire, Hillsborough, Merrimack, Rockingham and Strafford counties †insufficient data

**Media Engagement with Pest Control Customers**

The same five surveys from The Media Audit reveal adults 18+ planning pest control services over-indexed, on average, for heavy exposure\* to four offline media: newspaper at 160, radio at 132, direct mail at 120 and outdoor at 114, but under-indexed for TV at 88.

These adults over-indexed, on average for five online media: podcast listening at 198, audio streaming at 154, social media at 129 and the Internet and video streaming both at 116.

**Indices of Adults 18+ Who Are Planning Pest Control**

**Services During the Next 12 Months and Logged onto Social Media**

**Sites During the Past Month, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Social Media Sites | West Palm Beach, FL | Southern New Hampshire† | Chicago | Austin | Seattle-Tacoma |
| YouTube | * 116
 | * 109
 | * 101
 | * 112
 | 110 |
| Facebook | * 102
 | * 108
 | * 98
 | * 111
 | * 113
 |
| LinkedIn | * 144
 | * 198
 | * 168
 | * 129
 | * 179
 |
| Twitter | * 146
 | * 185
 | * 153
 | * 134
 | * 160
 |
| Pinterest | 133 | * 128
 | * 155
 | * 123
 | * 163
 |
| Instagram | 124 | * 163
 | * 136
 | * 104
 | * 132
 |
| Snapchat | 135 | * 173
 | * 159
 | * 104
 | * 194
 |
| TikTok | * 142
 | * 181
 | * 166
 | * 125
 | * 175
 |

Based on The Media Audit’s 2021 surveys

†Belknap, Cheshire, Hillsborough, Merrimack, Rockingham and Strafford counties

\*See page four for heavy exposure amounts

**More Valuable Insights**

**Top Ten Clothes Moth Cities and Top Ten Termite Cities, 2021**

|  |  |
| --- | --- |
| Clothes Moth Cities | Termite Cities |
| #1: New York | #1: Los Angeles |
| #2: Boston | #2: Miami |
| #3: Philadelphia | #3: Washington, DC |
| #4: Cincinnati | #4: Tampa |
| #5: Dallas | #5: Chicago |
| #6: Chicago | #6: Atlanta |
| #7: Portland | #7: New York |
| #8: Atlanta | #8: Raleigh |
| #9: Los Angeles | #9: Dallas |
| #10: Minneapolis | #10: Orlando |

 *Pest Management Professional*, March 2022 and

 *PCT (Pest Control Technology)*, March 2022

**The Media Audit: Heavy Exposure to Media, 2021**

|  |  |
| --- | --- |
| Media | Time |
| Radio | 180+ minutes during an average day |
| TV | 300+ minutes during an average day |
| Newspaper | 60+ minutes during an average day |
| Outdoor | 200+ miles during an average week |
| Direct mail | 75+ read weekly |
| Internet | 180+ minutes during a typical day |
| Social media | 180+ minutes during a typical day |
| Audio streaming | 180+ minutes during an average day |
| Podcast listening | 180+ minutes during a typical day |
| Video streaming | 180+ minutes during an average day |

*Sources:* Edmunds.com Website, 4/22; National Automobile Dealers Association Website, 4/22; *Used Care Dealer* Website, 4/22.

*Updated*: April 2022

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**Local Market and Station Information**