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2022 STATE OF THE **RODENT** MARKET



RATS RULE IN 2022

ALL RODENTS A STRONG BUSINESS OPPORTUNITY

MULTIFACETED TREATMENT APPROACHES

EXCLUSIVE RESEARCH!

Growing Profitability WITH AFFORDABLE TECHNOLOGY AND LABOR SAVINGS

There is a high likelihood that your business has endured a series of challenges of late. It could be in the form of higher demand volatility, supply chain disruption, labor shortages or higher costs — or all four at once. As a result, many of us have had to reconfigure our go-to business strategy. At Bell, our goal is to provide you with the highest-quality rodent control products. Additionally, it is also our goal to assist you in alleviating some of the above pressures that face your business. This is why we made a major program announcement at PestWorld in Boston that we are eliminating the recurring monthly app and portal fee associated with our iQ line of rodent monitoring products. Going forward, there will be no usage fees whatsoever. This means that all pest control company technicians can deploy an unlimited amount of iQ sensing devices without having to pay for the data.

The iQ line of products, in addition to delivering enhanced efficacy, can assist with your labor concerns. That is because IQ products have a demonstrated ability to extend the productivity per labor hour of a technician. In turn, you will realize a reduction in unit-of-labor per account serviced. Consequently, you can service more accounts with your existing labor force, or service the same number of accounts with fewer technicians.



Steve Levy



To illustrate the time savings our rodent control technology can bring to your business, Bell conducted a comprehensive time study. Using a combination of multiple catch mouse trap devices and rat bait stations across a 600,000-square-foot commercial manufacturing facility, we timed a technician servicing all the devices as standard devices. Afterward, we replaced the standard multiple catch traps and bait stations with 24/7 iQ sensing traps and Express iQ sensing trays.

Our technician conducted six separate services on these 228 smart iQ devices and the average time savings was astounding, with much of the reduction coming directly from more efficient service. iQ devices communicate rodent activity from 30 to 100 feet away, which significantly shortened the walking route. It eliminated the need to bend, open and visually inspect the devices that didn't have rodent activity. The technician still receives proof-of-service time stamps as validation that traps were inspected via its data connection.

The average time savings of iQ devices compared to the standard device equivalents adds up to an overall 78% time savings.

In essence, the iQ product enabled the technician in this study to be nearly 5 times more productive than without the iQ products. Clearly that kind of a result will address both labor shortages and higher labor costs.

I would encourage to reach out to your Bell technical rep as they would be happy to review the study details with you and see how these products can provide a positive impact to your existing business, affordably.

We appreciate your support and thank you for your business.

Steve Levy

President and CEO
Bell Laboratories



Rats Rule in '22



Historically, when Ace Exterminating in Joelton, Tenn., would get a customer call about rat activity, the technician who went on the call would, nine times out of 10, find mice instead. Mouse infestations were common in suburban and rural homes across middle Tennessee, while rats tended to stick close to the city — namely, Nashville.

The COVID-19 pandemic changed that dynamic.

“Downtown Nashville had always been a hub for Norway rats, but when restaurants and businesses shut down for COVID, the rats’ usual food sources were suddenly out of reach,” says Tim Jackson, vice president at Ace. “They migrated outward into surrounding residential communities in search of food.”

Finding that food wasn’t difficult, given people were spending more time at home and generating more trash, which was often left sitting in cans and

dumpsters far longer than it should have. “Labor shortages caused trash collection services to cut back on the frequency of their pickups; trash piled up in some neighborhoods for weeks or even months at a time,” explains Alex Berry, pest control manager at Ace. “Those conditions were ideal for hungry rats.”

In turn, the influx of rats became an ideal business opportunity for Ace. Jackson says that rats now represent a larger percentage of the company’s annual revenues than before, as technicians place as many bait stations in a week as they used to place in a year. Today when they get a rat call, they expect to find actual rats. “We’re not the only ones experiencing this surge,” he says. “Pest management companies and suppliers across the region tell us that they’re dealing with the same thing. It looks like Norway rats are here to stay.”

The Nashville market isn’t unique. Norway and roof rat pressure is intensifying across the country, as evidenced by the results of the 2022 PCT State of the Rodent Control Market survey, sponsored by Bell Labs. When PCT asked PMPs which rodents were problematic in their markets, 86 percent said rats, compared with 76 percent who said mice. That’s an 11 percent increase for rats and a 3 percent decrease for mice. In addition, 59 percent of PMPs said rat infestations were up in 2022, compared with 44 percent who said the same of mice.

Tom Drapeau of Freedom Pest Control is certainly seeing this trend across his New England accounts. “House mice have traditionally represented a large percentage of our revenues; we also get a lot of calls for deer mice,” he says. “But for the past three years, Norway rats have been our leading rodent. Even more recently, in the past four to five months, as calls for mice are holding steady, our rat work continues to grow at a rate of 14 to 20 percent a month.” ■

Rodent Infestations Up in Past Year

Over the past year, have the number of rodent infestations in your location’s market area increased, decreased or remained the same for each of these rodents?

	Increased	Decreased	No Change	No Infestations
house mice	42%	3%	44%	4%
Norway rats	40%	6%	31%	15%
roof rats	37%	1%	24%	26%
squirrels	17%	4%	31%	26%
deer mice/white-footed mice/ cotton mice (<i>Peromyscus</i> genus)	15%	3%	28%	33%
moles	11%	3%	25%	31%
ground squirrels	9%	1%	20%	42%
gophers/pocket gophers	8%	3%	17%	45%
meadow voles	6%	0%	22%	44%
chipmunks	6%	1%	22%	42%
pack rats	4%	0%	15%	53%
indicated none	24%	82%	24%	36%

Source: Readex Research; Respondents: 144

Rats Are More Problematic than Mice

Which rodent species tend to be problematic in your market area?

	2022	2021	± Change
Rats	86%	75%	+11%
Mice	76%	79%	-3%

Source: Readex Research; Respondents in 2022: 144; Respondents in 2021: 170; Respondents could select multiple answers



Problematic Species

Which specific rodent species tends to be problematic in your area? (Top 3 answers)

	2022	2021	± Change
House mice	75%	76%	-1%
Norway rats	59%	52%	+7%
Roof rats	53%	44%	+9%

Source: Readex Research; Respondents in 2022: 144; Respondents in 2021: 170; Respondents could select multiple answers



A STRONG BUSINESS OPPORTUNITY

The proliferation of rats, along with steady pressure from mice, squirrels, moles, chipmunks, gophers and other rodents, bodes well for business. Two in three PMPs (66 percent) said they expect to see an increase in the percentage of revenue generated by rodent work, and more than half (51 percent) said that rodent work has become more significant to their business over the past five years.

The residential market generates the most rodent income for about three-fourths (74 percent) of pest management companies; the commercial market accounts for the highest income among the other one-fourth (25 percent).

“Right now, more than half of our revenues come from rodent services, and we expect to see that percentage continue to rise,” says Tristen Rush of Tailored Pest Solutions in Pelham, Ala. “A lot of

people are still working from home and spending most of their time at home, so they’re very tuned in to the signs that they may have infestations of squirrels, roof rats, mice or other animals.”

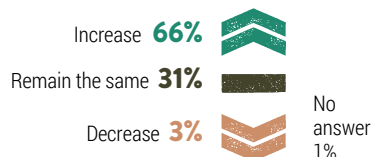
Like the majority (60 percent) of PCT survey respondents, Rush structures his rodent contracts to fit the particular circumstances of an account. “If it’s mice, then I just incorporate the service into the general pest contract. If it’s rats or something bigger, then I set the customer up with a stand-alone contract that includes two to four weeks of dedicated trapping. If they won’t let me do the exclusion work, then we’re looking at a longer-term contract that includes rodenticide in addition to trapping,” he explains.

When he does do the exclusion work, Rush provides a one-year warranty. “I set customers’ expectations so they understand that it’s not realistic to believe

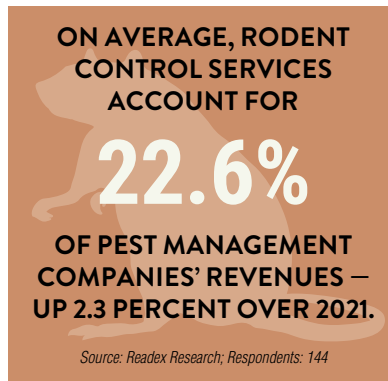
they will never see another rodent. No matter how well we exclude, rodents will work night and day to find or create a new way in. So we do our best job to seal the structure, and if an issue comes up for the customer, then we are always here to work through that with them,” he says.

That high level of commitment keeps rodent exclusion work rolling in for Rush, not only because customers talk to their neighbors but because other local pest management businesses have taken note. “Our business is 100 percent referral-based, with most of our leads coming from companies that don’t do exclusion work,” explains Rush. “I don’t poach their general pest work; I just do the exclusion work and build rapport with the customer to not only let them know they can rely on us, but also solidify their confidence in the general pest firm that sent us there.” ■

Rodent Revenues Are Climbing
Compared with last year, how do you expect the percentage of revenue generated from your location's rodent control services to change?

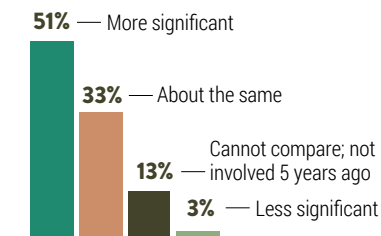


Source: Readex Research; Respondents: 144



Bigger Piece of the Pie

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



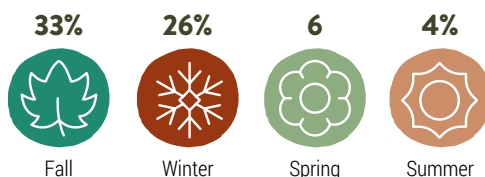
Source: Readex Research; Respondents: 144

Cool Cash Flow

What season tends to be the busiest for your location providing rodent control services?

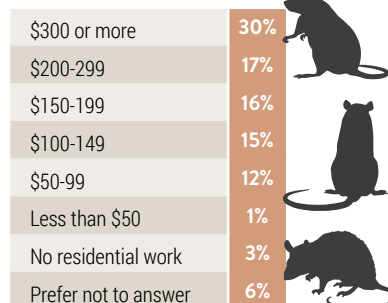
No seasonal difference 31%

Source: Readex Research; Respondents: 144



Residential Revenue

How much does your company location charge for a typical residential rodent control job?

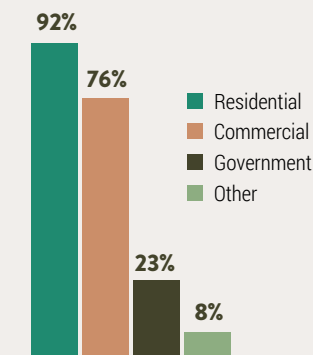


Source: Readex Research; Respondents: 144

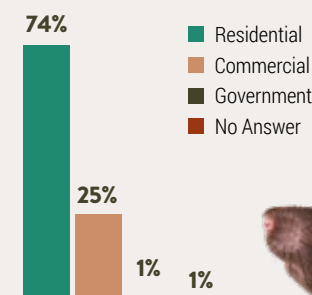


RODENT LOCATIONS, REVENUES

In what markets does your location provide rodent control services?



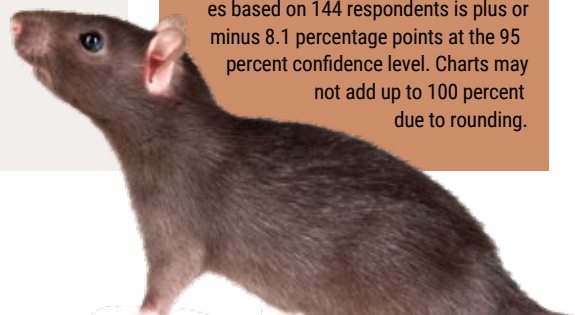
What rodent control market generates the most income for your location?



Source: Readex Research; Respondents: 144; Respondents could select multiple answers

ABOUT THE SURVEY

The 2022 PCT State of the Rodent Control Market survey was sponsored by Bell Laboratories and compiled by Readex Research, a privately held research firm in Stillwater, Minn. A sample of 4,674 pest control company owners, executives and technical directors was systematically selected from the PCT database. Data was collected from 148 respondents — a 3 percent response rate — via an online survey from August 25-September 6, 2022. Four respondents indicated their companies did not provide rodent control services and were terminated from the survey. The margin of error for percentages based on 144 respondents is plus or minus 8.1 percentage points at the 95 percent confidence level. Charts may not add up to 100 percent due to rounding.





HAS YOUR COMPANY
LOCATION INCREASED ITS
USE OF NON-TOXIC RODENT
CONTROL PRODUCTS/
SERVICES IN THE PAST
12 MONTHS?

35% SAY YES

Source: Readex Research; Respondents: 144

A MULTIFACETED Treatment Approach

Success in treating rodents depends on a variety of factors: the products and services applied, customer understanding and collaboration, and the ability to read and anticipate rodent behaviors, to name a few.

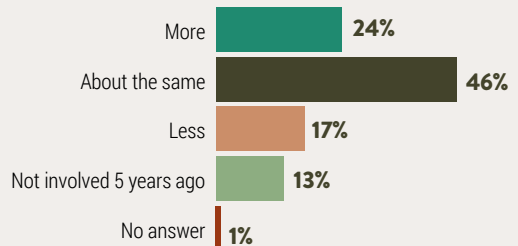
PRODUCTS AND SERVICES. Most PMPs continue to incorporate some combination of bait stations (used by 94 percent), snap traps (84 percent), block baits (82 percent), exclusion (71 percent) and glue traps (70 percent), as well as other tools. Some PMPs are leaning toward using more non-toxic products as consumers become more vocal in their personal preference against such products, and as rodenticides face increasing regulatory scrutiny.

“Our customers are not interested in non-lethal control, but they do ask about the impact of rodenticides on the environment and what they can do to control the rats or mice without rodenticides. Five years ago, we used second-generation anticoagulants in about 95 percent of our rodent calls; now we’re at about 60 percent,” says Tom Drapeau of Freedom Pest Control. “We focus a lot on exclusion — not just sealing holes, wrapping pipes and such, but also explaining to customers how they can exclude rodents from food sources and nesting areas by doing simple things like cleaning debris in their yards.”

CUSTOMER UNDERSTANDING AND COLLABORATION. The education aspect Drapeau mentions can be critical to gaining and maintaining control of rodents in residential settings, but many customers resist doing the right thing because of cost, says Daniel Hamilton, termite manager at Ace Exterminating. “Customers expect us to solve the problem, but then they refuse to let us do the necessary exclusion work,”

Rodenticide Use Remains Steady

Are your location’s rodent control services more or less dependent on rodenticide use today than they were five years ago?



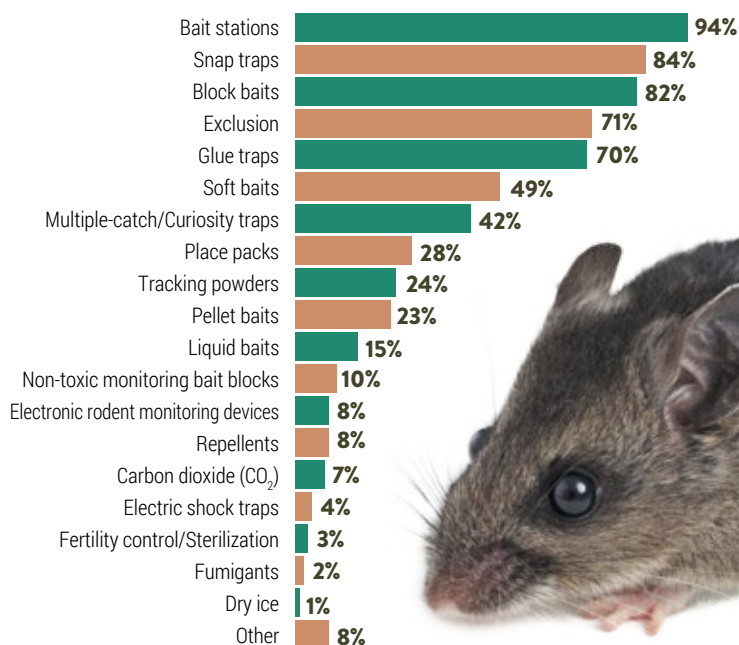
Source: Readex Research; Respondents: 144

he explains. “They think that rodents are always looking for food, and so they insist that an outdoor bait station is all they need. We have to explain to them that sometimes rodents are looking for shelter; if potential entry points are not repaired, those rodents will come right in once the weather cools.”

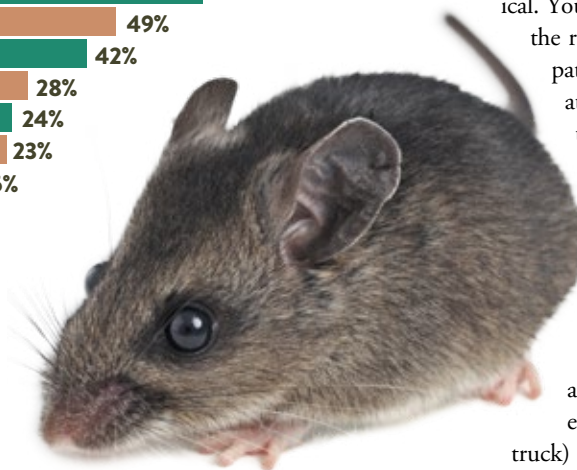
Kurt Treftz of Cascade Pest Control sees people trying to cut corners,

Control Products Used

What types of products/services does your location use to control rodents?



Source: Readex Research; Respondents: 144; Respondents could select multiple answers



knowledge and experience.

“So many times, a homeowner will ask me why they still have a rodent problem after using home remedies or do-it-yourself snap traps or rodenticide,” Swartz shares. “All of us in pest control know that it’s because strategy is so critical. You need to understand where the rodents are coming in, what path they travel once inside the attic or crawlspace, and what they like to eat. You need to always be thinking like a rodent so you can anticipate their next move and stay a step ahead.”

Swartz’s standard protocol involves suiting up in PPE (for his own protection, as well as that of his customers, and the cleanliness of his truck) — a Tyvek suit, respirator, headlamp, safety glasses and rubber gloves — and knee pads, and then crawling through the attic or crawlspace to identify the path rodents are traveling. He sets as many as 45 snap traps in an attic to make sure no rodent eludes their fatal grip.

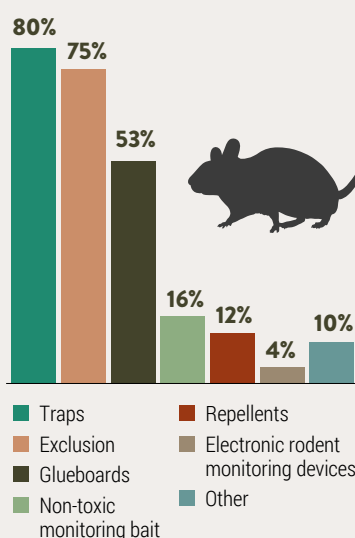
“Catching the alphas can be tricky, because even though they move more, which makes them more likely to come into contact with your trap, they can trip a trap without getting caught,” says Swartz. “When you set the traps just a foot apart and use bait they can’t resist, after they trip a trap, they will jump to the next one. That’s where they make their mistake.”

Using this strategy, Swartz once caught 22 rats in one home in one day. What irresistible bait did he use to lure them to his traps? Vanilla wafers crumbled onto small pieces of Hershey’s chocolate. “Works every time,” he says. ■



Non-Toxic Products Used

Which non-toxic rodent control products were utilized most frequently at your location in the past 12 months?



Source: Readex Research; Respondents: 51 (those whose location has increased its use of non-toxic rodent control products); Respondents could select multiple answers

too, without regard for effectiveness. “In the Greater Seattle region, rats are everywhere,” he says. “Years ago, they were established only in the older urban areas. But urban/suburban sprawl has since drawn them into a vast network of neighborhoods. Also, our climate, which includes a good deal of rainfall, has allowed them to thrive in the parks, wetlands and beaches. They are endemic to our region now.

It’s not a matter of *if* they’re going to infest your home but *when*. Yet a lot of homeowners insist they just need a one- or two-time service and then they will ‘see how it goes.’ Managing rodents here requires a more sustained approach.”

THE ABILITY TO READ AND ANTICIPATE RODENT BEHAVIORS.

When Brandon Swartz owned a crawlspace business in Seattle, he got to know Norway and roof rats really well. Customers of his current business, It’s Bugs or Us Hill Country, in Texas, benefit from his

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For information on how the Power of **iQ** products can enhance your rodent control service and solve problems at your accounts, contact your local Pest Control Distributor or visit www.bellsensing.com.



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