Still positive after all these years

What a resilient lot professional pest controllers have turned out to be. In what is the seventh year of the National UK Pest Management Survey pest professionals have, once again, clearly stated their belief that the prospects for UK pest control are very bright.

The 2017 online survey of Pest readers at the sharp-end of pest management took place in March 2017. There was an impressive 10% response rate. Even allowing for the likelihood that those who are not doing so well might choose not to participate, the optimism and ‘go-for-it’ attitude we have measured is overwhelming.

Approaching 80% of respondents (78% to be precise) predicted that prospects for the coming year were either good (48%) or very good (30%). Over the medium (five-year) term, three-quarters (75%) said prospects were either good (44%) or very good (31%). Indeed the 2017 survey recorded the highest percentage ever of respondents predicting that prospects over both the immediate and medium term were ‘very good’.

Changes for the better

For those working in the private sector, either for companies (as technicians, biologists, managers, directors or owners) or as self-employed pest controllers, this optimism is reflected in actual business performance. We ask these groups to tell us about the state of their business in the previous year.

The results from the 2017 survey had the largest number yet reporting that profits were up – 59%; a significant 7 percentage points higher than in the previous year, which was, itself, a record high for the survey. Even more encouraging just 4% recorded a decline in profitability compared to 10% in the 2016 survey. The figures from the first year of the survey, back in 2011, were just 25% reporting an increase in profits and 18% saying profits were down. How things have changed and for the better!

So what’s keeping pest professionals busy?

When it comes to activities, comparing results from 2012 with 2017 there are few, if any, changes. The bread and butter pests have been, and still are, rats and mice. Rodent control accounted for half of all pest control activity in the UK, according to the 2017 survey. In the 2011 survey it made up 48%, so, very little difference. The next biggest pest control activity in 2017 was, at 13%, wasp control. In 2011 wasp work made up 16% of all pest management activity so, on the face of it, there has been a decline in wasp control work.

But, as we know, wasp work is very weather dependent so, fluctuations in activity levels can be expected. Unfortunately, due to a change in the way figures were collected, the overall impact of what was a catastrophic wasp year for pest controllers – the summer of 2012 – was not recorded in the same way.

What was recorded, however, was that 83% of survey respondents experienced a decline in wasp work in the summer of 2012. It seems likely therefore that, during that year, wasp work would not have made up anywhere near 16% of pest control activity. By the summer of 2014 (the next time comparative figures were recorded) wasp work was measured at 14% of all pest control work so maybe the summer of 2011 (reported on in the 2012 survey) just happened to be a very good year for this seasonal and weather dependent pest.
Despite all the hype about bed bugs, over the past seven years this pest has only ever accounted for around 4% or 5% of all activity. Similarly, both cockroach control, at 3%, and ant work, at 4%, do not vary much from year to year. Across the board, insect control has consistently accounted for around a third of all control activity.

One area which does seem to be on the increase is bird management. Bird management has generally been at around 6% but, in the 2017 survey, that rose by 50% and now makes up 9% of all pest management activity, according to survey respondents.

**Market size**

Figures on the size of the UK pest management market are notoriously difficult to come by and the National UK Pest Management Survey is not designed to measure the actual size or value of the market. However, since the 2013 survey we have asked pest professionals to record which pest control activities increased, which decreased and which stayed the same compared to the previous year. This means we can provide an indication of which sectors of the market are expanding and which might be contracting.

Consistently, pest professionals have reported that the volume of rodent control work they are doing is increasing. On average across all six years almost half (48%) of pest professionals reported rat control work had increased and just 10% recorded a decrease. The figures for mice were 40% reporting an increase and 10% a decrease. Even if these increases were only small, it seems fair to say that the volume of rodent control work now being undertaken must be at a higher level today than it was in 2012. However, as we have seen, rodent control activity has remained at around 50% of all pest management work suggesting that other types of pest management activity must also have increased.

This is borne out by the data which show more pest controllers reporting increases than decreases in all types of pest management work, with the exception of wasp, ant and cockroach control. For ants and cockroaches a net decrease in activity has been recorded in most years. This suggests that these two pests are not as problematic as they used to be, so it is reasonable to assume that the control tools we have to combat them are working well.

Wasp, as previously mentioned, are very weather dependent and this too is reflected in the survey findings with increases and decreases fluctuating from year to year.

In the early years of the survey the majority of pest professionals (approaching 70% in 2012) were reporting increases in bed bug work. However, in recent years, the numbers reporting that bed bug work had increased over the previous year has fallen. It is fair to say, however, that the volume of bed bug work today must be higher than it was when the survey began.
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Self employed pest controllers

Over the six years of the survey, self-employed pest professionals have reported a generally improving picture in terms of profitability and for the past three years have been extremely positive about the future.

A third of our sample (79) in the 2017 survey were self-employed pest controllers. Almost a third of this group work in London and/or the South East, with just over a fifth in the South West and the remainder scattered across the rest of the country.

Over the years this group has seen a steady improvement in profitability. In the 2017 survey more than half (53%) told us that profits were up and just 6% reported profits as down. Back in 2011 only 17% said profits had risen and 29% reported a fall in profitability.

On average 45% of activity is in rodent control – in particular rats, which take up just over a quarter (26%) of a self employed pest controller’s time. The next biggest activity is wasp work (18%) followed by other mammals, an area of work which now makes up 16% of activity compared to just 8% back in 2011.

Half of all activity is conducted in domestic homes and almost a fifth (19%) is now on farms, with the remaining 31% for commercial clients. Whilst the work on farms is significantly higher than it was in 2011 (15%) it has been higher, reaching 29% in 2013. No clear pattern emerges, so whilst it would be good to be able to say that farmers are waking up to the need for professional pest control that idea is not backed up by our data.

As the graph shows, for the past three years this group has been very optimistic about its prospects over the coming year. If anything prospects for the next five years have been viewed even more positively, with 80% now saying prospects are ‘good’ or ‘very good’.

Threats and concerns

The top two threats to rodent control identified by self-employed pest professionals have consistently been ‘DIY control’ and ‘financial pressure on households/businesses’. Concern about ‘poor professional pest control practitioners’ has made the top three on two occasions in 2013 and 2016. Whilst in 2014, 2015 and, again, in the 2017 survey, increasing restrictions on how products can be used is listed as an important threat to rodent control. The latter must surely be to do with the perceived impacts of rodenticide stewardship.

When it comes to insect control the main threats are much the same as for rodent control, namely ‘DIY control’ and ‘financial pressure on households/businesses’. Over the past two years, however ‘declining insecticide range’ has been identified as the third biggest threat to insect control replacing ‘poor professional practitioners’.

What you said...

In the 2017 survey participants had the opportunity to add comments about other concerns.

For rodents, the need for a much bigger focus on proofing and hygiene and the lack of coordination between public and private pest controllers were identified. There were concerns expressed too about the way in which rodenticide stewardship will be applied, particularly by the ‘larger’ companies who, some self-employed pest controllers felt, ‘are too quick to go down the poison route.’

There was also specific criticism about how the bigger companies track their employees and time visits, thereby encouraging shortcuts. It was felt pest controllers following the true spirit of the stewardship guidelines would be put at a disadvantage as they would need to charge more for more frequent visits.

Some also called for more research into mechanical controls and others highlighted the need for better client education.

Of a more general nature form filling and increased paperwork were identified as ‘a pain in the neck’ and, not for the first time, several people wanted to stop rodenticides being sold to Joe or Joanne Public.

The National UK Pest Management Survey 2017
Local authorities

Local authority pest control units have had it tough over the past six years and today they make up a much smaller proportion of survey respondents than in 2011. Those that are left are now feeling more optimistic about their future, although a third still view prospects as uncertain.

The proportion of local authorities taking part in the National UK Pest Management Survey has declined steadily over the years, a reflection of what has happened to local authority pest control units during that time. In 2011, 35% came from the public sector. In the 2017 survey just 23% (57) came from local authorities. These were equally split between pest technicians and directors/managers.

Further evidence of how the public sector has shrunk is seen in the change in the size of local authority teams. In 2011, 54% were in teams of five or fewer and a third (33%) had between five and ten individuals in their team. By 2017, 72% were in teams of five or fewer and just 14% had between five and ten people in their team. Because this survey is conducted among Pest readers, i.e. among people who are involved in professional pest management, it should come as no surprise that 72% of local authority respondents still work for councils which conduct all their pest control services through an in-house team. In 2011 this stood at 82% so it has fallen. Around 7% of our sample sub-contract the whole service to the private sector and 4% offer no service at all. In the recent British Pest Control Association survey of all local authorities around 20% offered no service at all. (See Pest 51: June & July 2017.)

The way local authorities charge householders has also changed. From 2011 to 2014 between 44% and 48% of the councils in our survey offered a free service for ‘all, or some pests/groups of people’. In the 2017 survey this had fallen to just 29%.

The core service offered by local authorities has always been rodent control. In 2017, 39% of local authority activity was combating rats, with a further 23% tackling mice. In 2011 the figures were 38% rats and 21% mice, so very little difference. Wasps too continue to be important at 16% in 2017 and 19% in 2011. Throughout, local authorities have been more likely than any other group to report decreases in a particular pest control activity. Local authority pest control takes place primarily in the domestic sector (74% of all activity in this year’s survey).

Future prospects

Local authorities have had it tough in recent years, nevertheless this group has been surprisingly resilient when looking to the future. Prospects for the year ahead however, have always been viewed more positively than those over the longer, five-year period. The low point for immediate prospects was reached in the 2013 and 2014 surveys with just 40% or so assessing prospects as ‘good’ or ‘very good’.

However, perhaps a corner has been turned because, for the first time in the 2017 survey, local authority people did not select ‘local authority cutbacks’ as the biggest threat to rodent control. Indeed this category slumped from 75% to 51%. The top barrier to rodent control for local authority pest control was identified as ‘financial pressure on households/businesses’. This was followed by ‘local authority cutbacks’ with ‘DIY control’ in third place. The threats from ‘rodenticide and behavioural resistance’ are also thought to be rising, whilst concerns about ‘product use restrictions’ have tailed off. For insect control concerns about ‘DIY control’ have leapt up the rankings along with fears about ‘increasing insecticide resistance’, but worries about ‘local authority cutbacks’ and ‘declining insecticide range’ have both tailed off.

What you said...

In the 2017 survey participants had the opportunity to add comments about other concerns. Among the barriers to rodent control were the refusal of householders to take ownership of a problem and a lack of willingness to work cooperatively with neighbours to solve a problem. Also highlighted were the general public using rodenticides, the incorrect use of snap traps and glue boards and the dangers of the Internet where customers look online for information on how to deal with a pest – a little knowledge is a dangerous thing!

The need for education and the importance of hygiene and housekeeping were also mentioned. One of the biggest concerns is that because of cutbacks in free public health pest control services there will be few, if any, rodent treatments in poor areas. The fear is that this will store up problems for the future.

Others are worried about the use of single feed rodenticides outdoors, especially by amateurs, seeing this as a retrograde step and wondering: “Why, if you can’t buy prescription pills over the counter, can you still buy rodenticides?”
Companies

Those working for companies as owners, directors, managers, field biologists and technicians have consistently been the most positive about the future.

Pest professionals working in private sector companies made up 45% (111) of the sample in 2017. Of these around a third are pest technicians or field biologists, with two thirds being owners, directors or managers. Over a quarter (28%) are based in greater London and the South East, with the rest spread around the UK.

Around 75% of these businesses have been established for more than 10 years and almost a fifth (20%) work in teams of more than 20. However, over half are in small businesses, in teams of five or fewer. Essentially this picture has remained constant over the years.

In the 2017 survey 63% reported profitability had improved and a mere 3% that it had fallen. Back in 2011 only 31% reported that profits were up although at that time, the majority (57%) said that whilst business could have been better, given the state of the economy, they were satisfied with their results.

More rodent work

In terms of activity private sector companies are doing more rodent control business now than they were in 2011 and it represents a higher proportion of their total business at 52%; equally split between rats and mice. Bed bug work as a percentage of total workload appears to have peaked at around 7% in the period 2011 to 2014. It now makes up just 4% of total activity. For the reasons already outlined on page 15 this does not mean that the amount of bed bug work has fallen, just that it represents a smaller proportion of total workload. In every year more pest professionals in this group have reported an increase in bed bug work than reported a decrease and in the early years the numbers reporting an increase were high – 74% in the 2012 survey and 53% in 2013. In 2017, 32% reported an increase and 16% a decrease, with most saying the volume of bed bug work had stayed the same.

Wasp work has also fallen as a percentage of total workload but bird management is an area where there has been growth. Bird work has generally made up around 9% or 10% of activity but in 2017 it jumped to 13%

As might be expected companies do most of their work (between 60 and 70%) in commercial environments. Over the seven years of the survey there has been a steady increase in the amount of work done on farms rising from 5% in 2011 to 10% in this year’s study.

This group has consistently been the most optimistic about prospects for the coming year and over the medium (five-year) term. For the first four years, 75% viewed prospects as ‘good’ or ‘very good’ but in the past three years that has increased and now stands at 85% for the next 12 months and 84% over the medium (five-year) term.

Back in 2012, the biggest threats to rodent control were listed as ‘financial pressures on customers’ and ‘DIY controls’. Both of these fell steadily until 2015, when concerns about ‘financial pressures’ started to rise once again. In the 2017 survey ‘DIY control’ has also moved up the rankings. The logic is clear. As finances become tighter more householders are likely to turn to DIY solutions. From 2014 onwards the biggest threat, according to this group, has been from ‘increasing restrictions on how products can be used’.

For insect control, ‘financial pressure on customers’ has always been recorded as the biggest barrier. ‘DIY controls’ are less of a concern now than they were in the early years. This group, more than any, has always identified ‘poor professional practice’ as a major threat to insect control. In the past two years ‘declining insecticide range’ has also come up the rankings.

What you said...

In the 2017 survey participants had the opportunity to add comments about other concerns. Key among these were the reluctance of customers to get involved with Integrated Pest Management, the problems associated with supermarket specifications and auditors with too much power. Some also identified ‘profit before service’ as a major barrier.

More controversial is the view that the move towards one-day courses intended to comply with rodenticide stewardship is leading to lower professional standards. Concerns were expressed too about invasive species and the potential loss of ‘natural’ repellents and insecticides due to EU Biocides Regulation.

One respondent summed the situation up as follows: “Ah the usual. Clients who want no pests, but with no pesticides, auditors who only consider paperwork, rather than successful pest control, accountants who see costs, but not servicing standards and go for the cheapest, regardless and trade association members with terrible standards but no redress or expulsions!”

Main rodent control issues 2012 to 2017

Companies

- Increasing product use restrictions
- Financial pressures on customers
- Declining rodenticide range
- Local authority cutbacks
- DIY control