



MAINFRAME

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2022 NPMA RESEARCH STATISTICS — COMPILED FOR INVESTOR USE

Each year, PPMA conducts a series of polls and surveys to better understand consumer attitudes in relation to pest control services. This research provides tactical guidelines to resonate with various audiences.

We are excited to share the results from our recent research, listed below for your use. This information sheds light on consumer behavior, including consumers' perception of the pest control industry, how often homeowners use professional pest control services and how consumer actions may differ based on pest activity.

We encourage you to use this information to inform your marketing and media relations efforts. From press releases and social graphics to plan development and consumer relations, this research is a valuable tool for your company. Please note the proper citation boxes when using these statistics in your collateral for consumers and the media.

If you have any questions about the statistics shared below, please feel free to reach out to ppma@pestworld.org.



PEST CONTROL ATTITUDES & USAGE SURVEY – 2021 EDITION AKA “GENERATIONAL RESEARCH”

Rodents, mosquitoes, ticks, bed bugs, termites and cockroaches continue to be commonly mentioned as the most concerning public health threat due to their ability to transmit widespread diseases. They carry the greatest perceived public health threats.

- 52% of Millennials, 57% of Gen X and 62% of Baby Boomers consider mice/rats to be a “strong to severe threat to public health”.
- 46% of Millennials, 49% of Gen X and 43% of Baby Boomers consider mosquitoes to be a “strong to severe threat to public health”.
- 44% of Millennials, 50% of Gen X and 47% of Baby Boomers consider ticks to be a “strong to severe threat to public health”.
- 42% of Millennials, 51% of Gen X and 43% of Baby Boomers consider bed bugs to be a “strong to severe threat to public health”.
- 39% of Millennials, 49% of Gen X and 44% of Baby Boomers consider cockroaches to be a “strong to severe threat to public health”.

Across generations, homeowners make the connection between pest control professionals and protecting both public and family health.

- When prompted, 84% of consumers agree that pest control professionals play an important role in protecting public health.
 - Millennials - 82% | Gen X - 88% | Baby Boomers - 83%
- When prompted, 85% of consumers agree that pest control professionals play an important role in protecting their family’s health.
 - Millennials - 84% | Gen X - 91% | Baby Boomers - 80%
- When prompted, 85% of consumers agree that pest control professionals help protect public health from pest-borne diseases, food contamination and allergy/asthma triggers.
 - Millennials - 83% | Gen X - 89% | Baby Boomers - 84%

Homeowners of all ages expressed concern about the same pests, particularly ants and stinging insects.

- Across generations, more than 80% of Millennials, Gen X and Baby Boomers are most concerned about ants and wasps/hornets in and around their homes.
- More than 80% of Millennials and Gen X are concerned about mosquitoes and spiders in and around their homes.

TICKS

- 23% of Millennials, 24% of Gen X and 10% of Baby Boomers would call a pest control professional if they found only one tick in their home. **“I would immediately call a professional if there were just one of this type of pest.”**
- 36% of Millennials, 42% of Gen X and 44% of Baby Boomers would call a pest control professional if they found several ticks in their home. **“I would immediately call a professional if there were several of this type of pest.”**

TERMITES

- 35% of Millennials, 36% of Gen X and 48% of Baby Boomers would call a pest control professional if they found only one termite in their home. **“I would immediately call a professional if there were just one of this type of pest.”**
- 43% of Millennials, 47% of Gen X and 47% of Baby Boomers would call a pest control professional if they found several termites in their home. **“I would immediately call a professional if there were several of this type of pest.”**

BED BUGS

- 36% of Millennials, 36% of Gen X and 39% of Baby Boomers would call a pest control professional if they found only one bed bug in their home. **“I would immediately call a professional if there were just one of this type of pest.”**

COCKROACHES

- 26% of Millennials, 34% of Gen X and 28% of Baby Boomers would call a pest control professional if they found only one cockroach in their home. **“I would immediately call a professional if there were just one of this type of pest.”**
- 38% of Millennials, 36% of Gen X and 31% of Baby Boomers would call a pest control professional if they found several cockroaches in their home. **“I would immediately call a professional if there were several of this type of pest.”**

RODENTS (MICE OR RATS)

- 28% of Millennials, 31% of Gen X and 33% of Baby Boomers would call a pest control professional if they found only one mouse or rat in their home. **“I would immediately call a professional if there were just one of this type of pest.”**
- 38% of Millennials, 35% of Gen X and 36% of Baby Boomers would call a pest control professional if they found several mice or rats in their home. **“I would immediately call a professional if there were several of this type of pest.”**



HIRING A PEST CONTROL PROFESSIONAL

Across generations, many homeowners will hire a professional for tasks that are unfamiliar and about one-third indicate almost always hiring a professional.

- 46% of Millennials, 52% of Gen X and 60% of Baby Boomers
“I will hire a professional for tasks with which I am unfamiliar.”
- 30% of Millennials, 27% of Gen X and 31% of Baby Boomers
“I almost always hire professionals.”

‘Experienced’, ‘provides work guarantee,’ and ‘trustworthy’ are most consistently referenced as important in selecting a pest control professional. Among Baby Boomers, it is also highly important to be ‘bonded/insured’.

- More generally, a ‘well-known brand’ and being ‘convenient to contact’ are also important. For Millennials, being ‘highly rated online’ stands out as of greater relevance compared to the other generations.

The impact of online review sites varies across generations. Among Millennials and Gen X, *Facebook* is the most influential source. For Baby Boomers *Angie’s List* and *BBB* have greater credibility.

COMMUNICATION PREFERENCES

Phone calls remain the most preferred method of communication across generations.

- **Phone Calls:** 56% of Millennials, 67% of Gen X and 66% of Baby Boomers
- **Email:** 41% of Millennials, 39% of Gen X and 22% of Baby Boomers
- **Online Chat:** 38% of Millennials, 28% of Gen X and 4% of Baby Boomers
- **Text:** 36% of Millennials, 26% of Gen X and 17% of Baby Boomers
- **In-Person Visit:** 29% of Millennials, 35% of Gen X and 41% of Baby Boomers
- **Online Contact Form:** 27% of Millennials, 26% of Gen X and 8% of Baby Boomers
- **Tele-meeting such as Zoom or FaceTime:** 21% of Millennials, 14% of Gen X and 4% of Baby Boomers

Most Millennials and Gen X homeowners find it highly important for pest control professionals to offer communication methods other than telephone, such as text, email, or chat. Millennials and Gen X homeowners are also highly receptive to using a pest activity monitoring service.



GENERATIONAL RESEARCH

SURVEY BACKGROUND:

This survey was conducted across Millennial, Gen X and Baby Boomer generations with the goal of understanding similarities and differences related to pest control needs and perceptions.

Demographic surveyed – over 1,000 online interviews

Qualified Millennials, Gen X, Baby Boomers:

- No competitive employment
- Homeowners with minimum household income of \$60,000
- Decision maker/influencer for professional services pertaining to the home
- Used professional pest control services in current place of residence or likely to do so in the future

PROPER CITATION

When using these statistics in consumer and media facing collateral, please attribute to the National Pest Management Association stating:

*“According to the **National Pest Management Association** ...”*

At the end of the collateral, please include that:

*“This survey was conducted online on behalf of the **National Pest Management Association**.”*

HARRIS POLL – OMNIBUS SURVEYS

Q1 SURVEY: TERMITES

American homeowners (no regard for HHI-household income)

- 49% of American homeowners have hired a licensed pest control professional to conduct a termite inspection on their home.
- 51% of American homeowners have never hired a licensed pest control professional to conduct a termite inspection on their home.

PROPER CITATION

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*“In a survey conducted online by The Harris Poll on behalf of the **National Pest Management Association** ...”*

At the end of the collateral, please include that:

*“This survey was conducted online within the United States by The Harris Poll on behalf of **NPMA** between January 20-24, 2022, among 1,300+ adults ages 18+. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.”*

Q2 SURVEY: TICKS AND BEDBUGS

U.S. General Adult Populations

- 93% of Americans have at least heard about ticks.
 - 7% of Americans have never heard of ticks.
- Nearly two-thirds of Americans (63%) have seen or removed a tick from themselves, someone else or a pet.
 - 43% of Americans have removed a tick from themselves, someone else or a pet.
 - 20% of Americans have seen a tick before.
- 13% of Americans could identify a tick but have never seen one.
- 17% of Americans have only heard of ticks by name.

American homeowners (no regard for HHI-household income)

- 68% of American homeowners are aware that ticks can spread different diseases, such as Lyme disease, to humans through their bites.
- 62% of American homeowners would contact a pest control professional (also known as exterminator) if they found bed bugs in their home.
- 59% of U.S. homeowners would switch to a different hotel or motel if they found bed bugs at a hotel or motel they were staying at.
- 47% of American homeowners follow prevention techniques when entering tick infested areas (e.g., the woods or areas with tall grass).

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At the end of the collateral, please include that:

*“This survey was conducted online within the United States by The Harris Poll on behalf of **NPMA** between April 26-28, 2022, among 2,069 adults ages 18+. The sampling precision of Harris online polls is measured by using a Bayesian credible interval. For this study, the sample data is accurate to within + 2.8 percentage points using a 95% confidence level.”*



Q3 SURVEY A: RODENTS

- 49% of homeowners have ever found or had a problem with rodents, like mice or rats, at their home.
 - Gender: 55% of male homeowners; 42% of female homeowners
 - Region: 53% of homeowners in the Northeast; 43% in the South; 51% in the Midwest; 52% in the West have found or had a problem with rodents at their home.
- Over one-third (37%) of homeowners have found a single rodent at their homes.
 - 43% of male; 31% of female
- 14% of homeowners have had a rodent infestation (i.e., multiple rodents at their home).
 - 16% of male; 12% of female
- 68% of homeowners that are parents with children under 18 have ever found or had a problem with rodents, like mice or rats, at their home.
- 51% of homeowners that are married have ever found or had a problem with rodents, like mice or rats, at their home.
- 50% of American homeowners with a household income of \$75K+ have ever found or had a problem with rodents, like mice or rats, at their home.
- 52% of American homeowners with a household income of \$100K+ have ever found or had a problem with rodents, like mice or rats, at their home.
- Those with HHI of \$75K+ aged 18-44 (60%) are significantly more likely than those aged 55+ (40%) to have ever found or had a problem with rodents.

These are the top places American homeowners who have ever found a rodent in their home spotted the pest:

- Kitchen – 37%
- Garage/Shed – 32%
- Basement – 30%
- Backyard – 26%
- Living Room – 17%
- Attic – 17%
- Bedroom – 16%
- Bathroom – 14%
- Car – 7%
- Other – 4%

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At the end of the collateral, please include that:

*“This survey was conducted online within the United States by The Harris Poll on behalf of **NPMA** between September 6 - 8, 2022 among over 2,000 adults ages 18+, among whom over 1,300 are homeowners. The sampling precision of Harris online polls is measured by using a Bayesian credible interval. For this study, the sample data is accurate to within + 2.8 percentage points using a 95% confidence level.*

Q3 SURVEY B: COMMERCIAL PESTS

59% of Americans say that they would not return to a restaurant if they saw pests like cockroaches or rodents while dining.

- Gender: 55% of male Americans; 63% of female Americans would not return to a restaurant if they saw pests like cockroaches or rodents while dining
- Region: 60% of Americans in the Northeast; 57% in the South; 60% in the Mid-west; 59% in the West say that they would not return to a restaurant...
- 47% of parents with children under 18
- 60% of homeowners

55% of Americans say that they would not return to a grocery store if an item they purchased there was infested with ants, flies, cockroaches, rodent droppings or other pests.

- 48% of male; 61% of female
- 54% Northeast; 54% South; 57% Mid-west; 54% West
- 46% of parents with children under 18
- 56% of homeowners

54% of Americans say that their confidence in a company would go down if they found out their products were infested by pests like ants or cockroaches.

- 51% of male; 58% of female
- 52% of Americans in the Northeast; 53% South; 56% Mid-west; 57% West
- 47% of parents with children under 18
- 56% of homeowners

51% of Americans say that they would not visit a restaurant if the online reviews stated that pests like cockroaches or rodents were seen by others while dining.

- 46% of male; 56% of female
- 50% Northeast; 51% South; 49% Mid-west; 54% West
- 42% of parents with children under 18
- 52% of homeowners

51% of Americans would not purchase any products from a brand again if an item they had purchased before was infested with ants, flies, cockroaches, rodent droppings or other pests.

- 47% of male; 54% of female
- 48% Northeast; 49% South; 56% Mid-west; 50% West
- 40% of parents with children under 18
- 50% of homeowners

39% of Americans would be concerned about pest infestations (e.g., termites, rodents, cockroaches) if they used a self-storage unit.

- 36% of male; 43% of female
- 35% Northeast; 41% South; 38% Mid-west; 41% West
- 41% of parents with children under 18
- 41% of homeowners

31% of Americans are concerned about encountering pests such as cockroaches, rodents or pantry pests (e.g., grain beetles, Indian meal moths) at the grocery store.

- 30% of male; 31% of female
- 30% Northeast; 30% South; 28% Mid-west; 34% West
- 35% of parents with children under 18
- 33% of homeowners

14% of Americans would return to or visit a hotel or motel that has experienced a bed bug infestation in the past.

- 15% of male; 14% of female
- 11% Northeast; 14% South; 14% Mid-west; 17% West
- 18% of parents with children under 18
- 14% of homeowners

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“This survey was conducted online within the United States by The Harris Poll on behalf of NPMA between September 15 - 19, 2022 among 2,075 adults ages 18+, among whom over 1,400 are homeowners. The sampling precision of Harris online polls is measured by using a Bayesian credible interval. For this study, the sample data is accurate to within + 2.8 percentage points using a 95% confidence level.”

MISCELLANEOUS NPMA DATA

- Each year, **termites** cause more than **\$5 billion** in property damage, which is more like **\$6.8 billion** when you adjust for current inflation.
- **Rodents** infest approximately **21 million** U.S. homes each winter.
- Each year, more than **500,000** Americans visit the emergency room to be treated for **insect stings**.
- **76%** of pest control professionals say that **bed bugs** are the most difficult pest to eradicate.
- Each year, **40,000** Americans are exposed to animals that might have rabies and must receive preventive treatments.

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