

Date: July 22, 2020

Dear Honourable Presidents,
FAOPMA Country Members

Dear Sir/Madam,

Subject: Impact of COVID-19 on the Pest Management Industry in Asia-Oceanic region.

On behalf of the Executive Committee of FAOPMA, we wish every member the best and trust that we are coping well with the challenges faced.

In a short time, the COVID-19 pandemic has caused many uncertainties; Pest Control companies around the Asia & Oceanic region faced many disruptions in our business and at the same time provided opportunities.

It has forced us rethink about the way we conduct our business under the new normal situation created by the Pandemic. The COVID-19 pandemic outbreak is placing an overwhelming burden on PCO companies and business owners to respond with effective and appropriate interventions, policies and managing employees.

With so many rapid changes, FAOPMA deems it appropriate to conduct a questionnaire Survey on the Impact of COVID-19 on the Pest Management Industry in Asia-Oceanic region. During this time of uncertainty, we will do everything we can to support our members to share our different country experiences around the region and together we can learn. Should global pandemic conditions shift, we are confident we can quickly respond to changing market dynamics, minimizing impacts to our pest control business and disruptions to our customers and employee. **Please read Appendix 1 – Section 1.2 Objective of a Survey for a detail understanding of this survey.**

This survey which can be done on line in 5 minutes (18 questions only) - <https://www.surveymonkey.com/r/WGKF3XX>. It is important as the research findings will be shared and presented at the virtual online Conference FAOPMA –Pest Summit 2020) with the emphasis on Survive Covid-19, Protect Your Future - safeguarding the Pest Management Industry through an uncertain world. (November 2020). The results will help FAOPMA better understand how COVID-19 is affecting the regional Pest Management business and how FAOPMA can best support the members during these challenging times.

Therefore, we seek that each Country member through the National Association to inform their members to answer the web-linked questionnaires (see web address above.). You can link the survey to your Association or sent an email to seek their participation. **Date line: Sept 15, 2020.**

Secondly, we enclosed a hard copy of the Survey Questionnaire and you can translate them into your National Language for local response. Please ensure the questions sequence and format remains similar. It would be good if an answering template can be created for this purpose. Kindly email the summary to me latest by Sept 15, 2020.

Finally, we seek the corporation of Presidents of National Associations will also be given 5 - 10 minutes to present their findings and outcome on the impact of COVID-19 on the Pest Management Industry in your own country. The survey outcome and statistical analysis for this purpose will be provided by the Team Leader for this Research. Further discussions on the findings and impact of COVID-19 will be shared.

We trust that you will take this responsibility seriously as we work as a FAOPMA community to prepare for the impact of COVID-19; we want to share how to face these current challenging situation.

Should you have any queries and require further information please do not hesitate to contact me. Thank you and stay safe.

Yours Sincerely



Raymond Lee

FAOPMA

Honorary Secretary 2019/21

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Appendix 1

Title: Questionnaire Survey - Impact of COVID-19 on the Pest Management Industry in Asia-Oceanic region.

1.1 Purpose: The **main purpose** to conduct this study is to determine the impact of COVID-19 on the Pest Management industry in Asia-Oceanic region.

The findings of this survey will help the FAOPMA to determine the economic impact of the Industry and its effects on the business operations of the PCO. This brief survey can help FAOPMA to better understand how COVID-19 is affecting the regional Pest Management business and how FAOPMA can best support her members during these challenging times.

1.2 Objective of a Survey – Impact of Covid 19 impact of COVID-19 on the Pest Management industry in Asia-Oceanic region.

To achieve the objective of a survey, the online questionnaire survey will be used to identify the following:

- a) Economic impact of COVID-19 on the regional Pest Management industry,
- b) Understand how COVID-19 is affecting the business in each member country
- c) Identify the challenges that affects and impede the business growth in each member country during the COVID-19.
- d) Determine the key drivers of the business sustainability and growth in each member country during the COVID-19.

1.3 Methodology of the Research & Survey

- a) The Questionnaire survey will be sent to all FAOPMA Members and also PCO supplier companies who are associate members and non members.
- b) The Questionnaire survey will be carried out by FAOPMA Secretariat Office to ensure transparency and to maintain neutrality and confidentiality.
- c) Each Country Member or Association will be responsible to ensure that sufficient responses and survey questionnaires were sent out to the targeted sample population for the survey.

1.4 Questionnaires Designed

- a) The questionnaire was developed based on **adaptation** from various studies as reflected in the literature sources.
- b) The questionnaires are prepared to obtain the data about the impact of COVID-19 on **pest control business** correlated to **company background, staffs/employees** and **challenges faced by the PCO companies** in each country.
- c) As such these questionnaires were **designed specifically and the mapping to link them to the Survey objectives** to be achieved and the variables to be investigated.
- d) The questionnaire for the survey was designed to identify the challenges that affects and impede the business growth in each member country and to determine the Key drivers of the business growth in each member country during the COVID-19.

1.5 Data Analysis - Descriptive analysis will be conducted to answer the Survey objectives of the Study.

- a) The data collected was coded and analyzed using SPSS as it provides a lot of useful statistical tools for evaluating the data collected from the questionnaire survey.
- b) The data will be analyzed and statistical testing will be conducted in order to assess the relationship of the various variable and factors in the context of the impact of COVID-19 on regional pest management industry.
- c) From the outcome of the Survey, the impact and findings of each country will be correlated and where possible analysis conducted to determine the commonality of the economic impact on the business and to present some recommendations from the key drivers of the industry during the COVID-19 for members to emulate.

2.0 Summary and outcome.

- a) The Summary of the Survey findings and outcome will be presented at the Presidential Forum during the FAOPMA-Pest Summit 2020 online Virtual Conference in November 2020.
- b) The findings and outcome will help FAOPMA better understand how COVID-19 is affecting the regional Pest Management business and how FAOPMA can best support the members during these challenging times.
- c) It would provide some understanding and information to Suppliers and Manufacturers to determine how best to work with local PCO in collaborating together to recover from the impact of the COVID-19.

3.0 Confidentiality:

- a) The findings of this study and all results from the survey will remain confidential to FAOPMA.
- b) Information from the survey will not be sold or passed onto any other party.

Survey Team Leader: Dr Raymond Lee
Honorary Secretary
FAOPMA 2019/2021

File: Questionnaire Survey - Impact of COVID 19-Revised

**Survey: Tell us how your Pest Control business is affected by COVID-19.
FAOPMA launches regional survey to assess the economic impact of the corona virus
pandemic on our member's businesses**

1. FAOPMA Country Member:

- Australia
- China
- Hong Kong
- India
- Indonesia
- Israel
- Italy
- Japan
- South Korea
- Malaysia
- Mauritius
- Myanmar
- Saudi Arabia
- Singapore
- Taiwan
- Thailand
- Philippines
- Vietnam
- Qatar
- Sri Lanka
- Pakistan
- Others – Specify

2. Organizational Profile - Employee Size :

- 1 – 20
- 21 – 50
- 51 – 100
- Above 100

3. Organizational Profile - Years of Experience in the Pest Control Industry:

- 1 – 3 years
- 4 – 10 years
- 11 – 20 years
- Above 20 years

4. Type of Business services provided: (Please check all that apply.)
- General Pest Control Services & Termite Baiting
 - Sanicare & Hygiene
 - Fumigation
 - Equipment & Chemical supply
 - Disinfecting Services for COVID-19
 - Others : specify
5. Do you provide Disinfecting services? (Please check all that apply.)
- Before the COVID-19 Pandemic – regular service provided
 - After the COVID-19 Pandemic – new business opportunities
 - We do not have the “know-how” to provide Disinfecting services
6. What is your mix of domestic to corporate servicing? (Please check all that apply.)
- 0% domestic, 100% corporate
 - 25% domestic, 75% corporate
 - 50% domestic, 50% corporate
 - 75% domestic, 25% corporate
 - 100% domestic, 0% corporate
7. Estimated Annual Sales (US \$) (based on last year annual sales):
- Below US \$ 100,000
 - US \$ 100,001 – 200,000
 - US \$ 200,001 – 500,000
 - US \$ 500,001 – 1,000,000
 - Above US \$ 1,000,000
8. If you business has been affected, what percentage decline have you seen in the last 6 months for domestic household?
- Domestic household market: below 15 %
 - Domestic household market: 16 - 30 %
 - Domestic household market: 31 - 50 %
 - Domestic household market: above 50 %

9. If your business has been affected, what percentage decline have you seen in the last 6 months for corporate markets?

- Corporate market: below 15 %
- Corporate market: 16 - 30 %
- Corporate market: 31 - 50 %
- Corporate: above 50 %

10. How have your business been affected by COVID-19 pandemic?

- Not affected
- Slightly affected
- Moderately affected
- Strongly affected
- My business grew. Please specify

11. Changes in Business Operations (Please check all that apply.)

- We had had to close completely (after Lock Down / Movement Control Order/Restricted Movement)
- We have reduced on-site products/service treatment visits due to reduced customer appointments etc.
- We have reduced business operating hours
- Our Product / Service treatment offerings have to change due to customers demands.

Please specify any other Changes in Business Operations during COVID-19:

12. Changes in Workforce and Employee Size when we resume normal business Operations (Please check all that apply.)

- We had to lay off / retrench our workforce
- We anticipate reducing workforce in the next 6 - 12 months.
- We have reduced the working hours per employee
- We have reduced wages, allowances and staff benefits of employee
- We have employees absence due to sickness and childcare
- Heightening health-and-safety practices of employees

Please specify any other Changes in Workforce and Employee Size:

13. Changes in Sales activities: (Please check all that apply)

- We have seen an increased in sales enquiries.
- We have seen a reduction in sales enquiries.
- We are experiencing contract termination due to economic uncertainty.
- We are monitoring that existing customers have requested for contract value reduction.
- We are experiencing price competition
- Assurance to customers on customer health and safety

14. Changes in Finances (Please check all that apply):

- We are implementing an operational cost-reduction strategy to our business.
- We are monitoring/reducing spending due to uncertainty of the COVID-19 impact.
- We are experiencing slow payment collection from customers
- We anticipate serious cash flow problems to meet the business operations in the next 6 - 12 months.
- Mitigating cash-flow impact by engaging with customers and suppliers
- Others : specify

15. Issues encountered during COVID-19 and Government Support or Assistance:
(Please check all that apply.)

- Government Stimulus is not relevant to our pest Management Industry.
- We are experiencing problems in getting support and financial assistance from our government.
- Too many government restrictions and changes required for doing business during the COVID-19.
- We do not face any government restrictions during the COVID-19.
- Others : specify

16. FAOPMA is trying to identify ways that we can best support the Pest Management Industry community during the COVID-19 pandemic. How can we best help your pest control business navigate this situation?

- Organize Training courses online and Gathering virtually for education and discussion forums.
- Working to innovate together and find new ways to support the regional Industry
- Providing workforce resources and training for pest control industry certification requirements.
- We do not require any help
- Others : specify

17. Are there any other comments you would like to add to the survey?

Instructions: The following questions relate to the changes your business has made in response to COVID-19.

18. HIERACHY of Fear Factor during the COVID-19 Pandemic.

As a PCO, how do you rank in terms of your concerns the following factors as you continue to manage the Business in the **next 12 months** specific to your country? Please rank in terms of most concern (No 1) and least concern (No 10) for these factors.

	Ranking (1 to 10)	Fear Factors of concern
	Most concern	
a		Reduced employee productivity
b		Financial impact - Cash Flow problems
c		Business closure - Temporary
d		Safety & Health of employee due to COVID-19
e		Fall in Customer demand and Sales
f		Employee retrenchment & lay offs
g		Bank financing and Loan repayments
h		Employee salary Freeze and removal of Bonus
i		Disruption in supply – insecticides & equipments.
j		Litigation
	Least concern	