

# 2021 STATE OF THE **BED BUG** CONTROL MARKET

## **INSIDE**

Bed Bug Business:  
All Over the Map

Optimistic  
Outlook

Plenty of Treatment  
Options

Sometimes Misidentified,  
Often Misunderstood

Exclusive Market  
Research

SPONSORED BY



*"My favorite thing about the product is how well it works and how well it holds up to our harsh environments, especially here in Arizona.*

*Temprid has definitely reduced our callbacks."*

– **Austin Burns**, Burns Pest Elimination, Phoenix



**Temprid**<sup>®</sup>  
**FX**

*When you're ready to ditch the callbacks, it's Time for Temprid.*

It's your go-to solution for increased efficacy, ease of use, decreased callbacks, and unmatched flexibility. Its co-milled, dual active technology delivers increased power – controlling over 50 hard-to-kill pests indoors or out. If you're ready for powerful control, *it's time for Temprid.*

ALWAYS READ AND FOLLOW LABEL INSTRUCTIONS.

Bayer Environmental Science, A Division of Bayer CropScience LP, 5000 CentreGreen Way, Suite 400, Cary, NC 27513. For additional information, call toll-free 1-800-331-2867.

www.environmentalscience.bayer.us. Not all products are registered in all states. Bayer, the Bayer Cross and Temprid are registered trademarks of Bayer. ©2021 Bayer CropScience LP.

# BED BUG BUSINESS: ALL OVER THE MAP IN 2020



**I**n a year like none before it, pest management companies had to be ready for anything. Would business be up? Down? Different? The same? The answer, of course, was “Yes.” The only consistency seemed to be inconsistency, and those prepared to go with the flow fared best.

Case in point: bed bugs. When surveyed by PCT for this 2021 State of the Bed Bug Control Market report, PMPs described bed bug business in terms ranging from “a standstill” to “business as usual” in 2020. It seems that in the pandemic environment, some customers were less afraid of infestations than infection: They put off calling for treatment. Others recognized that those bugs weren’t going to go away on their own and welcomed technicians into their homes.

Kyle Stiemsma of Terminator Pest Control in Cambria, Wis., was among those who experienced a slowdown in 2020, but his business has rebounded. “Our bed bug business slowed down for quite a while last year,” he says, “but

calls picked back up in 2021, and we’re back to the level of activity we’ve seen in previous years.”

Conversely, Gary Andrews says that his team at Prudential Pest Management in Burton, Mich., stayed busy throughout pandemic shutdowns. “Our bed bug business has been steadily growing for the past several years; 2020 was no exception.”

Joe Smith of Kingfish Pest Control in Jacksonville, Fla., and David Poplin of Legion Pest Management in Murrieta, Calif., report similar success, with no downturn in bed bug business. Poplin reports increasing momentum in 2021, especially from summer into fall.

“In late summer, our bed bug business was up 13 percent across the board — single-home residential, multifamily, hotels, motels and hospitals,” he shares. “We also saw an increase in bed bugs in the VA hospitals we serve when they started inviting people in to get COVID-19 vaccinations. We’re used to seeing just one or two bed bugs in these accounts, but with so many people coming in,

some of our technicians encountered bugs at almost an infestation level.”

Hospital and nursing home accounts continued to be active for Sprague Pest Solutions in Tacoma, Wash., too, although calls from offices waned. “We haven’t had many calls from offices since COVID-19 sent people home to work, but we expect calls to increase once more people go back to their offices,” says Sprague’s Ashley Roden. “Hospitals, on the other hand, have called us with plenty of questions and concerns about bed bugs throughout the pandemic.”

Patrick Wyman’s hospital clients were not as active. “Our bed calls from hospitals went to almost zero in 2020,” says Wyman, whose team at Epcon Lane Pest Control, Akron, Ohio, has helped Northeast Ohio hospitals write and implement pest management protocols that likely helped them get through any pest challenges during the year. “Today is a different story: We’re on call 24 hours a day for our hospital clients and may get two or three calls a night for support,” he says. ●

# AN OFF YEAR, BUT OPTIMISTIC OUTLOOK FOR 2021 AND BEYOND



**F**or some, bed bug calls and revenues took a bit of a hit in 2020, but confidence abounds in 2021. For starters, the percentage of PMPs that offer bed bug services continues to edge upward — now at 84 percent, compared with 82 percent in 2019 and 83 percent in 2020. Even more telling is that more than half of PMPs, 52 percent, look for their bed bug revenues to increase in 2021. Only 42 percent held that optimistic outlook in 2020.

These charts tell the story of bed bug business across the U.S. — the ups, the downs and the potential outlook.

## A WEIRD YEAR

As a percentage of overall annual revenues, bed bug work may be waning slightly, although we need to be cautious about putting too much stock in the 2020 figure since it was such an unusual year. PMPs reported that bed bug services accounted for 14 percent of their 2018 revenue, about 13 percent of 2019 revenue and about 11 percent of 2020 revenue.

### BED BUG WORK AS A PERCENTAGE OF REVENUE



Source: Readex Research; Number of Respondents for 2020: 184

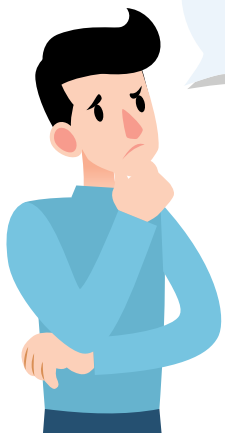
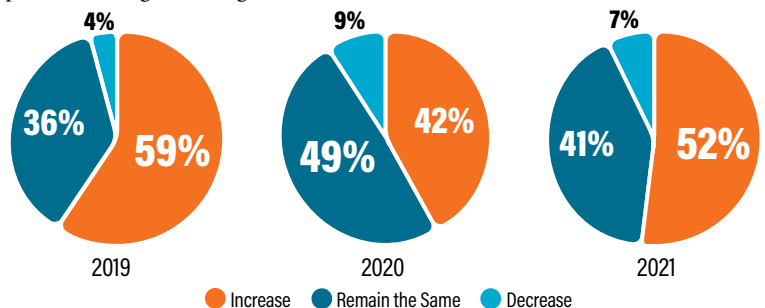


## CONFIDENT IN FUTURE WORK

PMPs say they expect bed bug revenues to rebound in the coming year, as confidence around managing the pandemic rises. More than half — 52 percent — look for an increase in bed bug revenue, and another 41 percent expect revenues to hold steady. Only 7 percent of respondents look for a decrease. While confidence still lags pre-pandemic levels, it shows marked improvement over last year's responses, when only 42 percent of PMPs expected bed bug revenue growth.

### REVENUE EXPECTATIONS FOR THE COMING YEAR

Source: Readex Research; Number of Respondents in 2021: 184



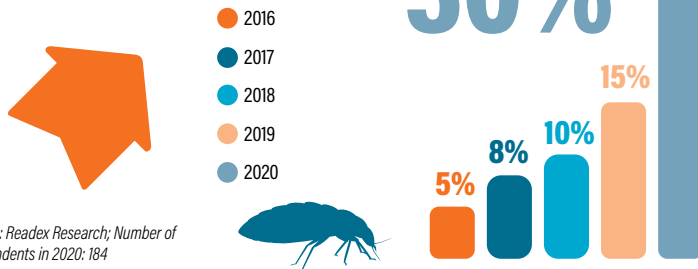


## A WEIRD YEAR, PART 2

While PMPs have been reporting some downward momentum in the number of bed bug jobs for the past several years, a larger percentage of respondents — 30 percent — said their numbers were down in 2020 more than the past two years combined. This likely reflects an aberration due to the pandemic conditions of 2020; it will be interesting to see how this number may improve once 2021 year-end tallies are in.

### SAW A DECREASE IN NUMBER OF BED BUG JOBS

(reported in subsequent year)



Source: Readex Research; Number of Respondents in 2020: 184

## GROWTH IN RESIDENTIAL

The bulk of bed bug revenue shifted more toward residential in 2020, as 88 percent of respondents said that single-family homes and multifamily housing represented the largest proportion of those revenues. This compares to 82 percent of respondents surveyed in 2019 and 2020, reporting on their 2018 and 2019 revenues, respectively.

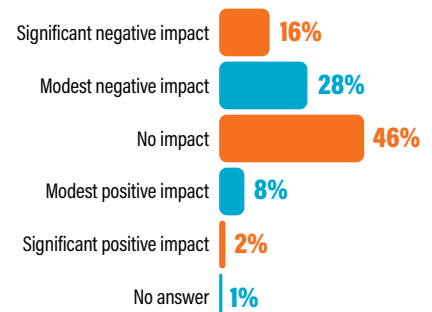


	2020	2019	2018
Single-Family Homes	48%	43%	43%
Apartments/Multifamily Housing	40%	39%	39%
Hospitality Industry	5%	8%	8%
Hospitals/Health-Care Facilities	4%	2%	3%
Schools/Colleges/Universities	1%	2%	1%
Transitional Housing	0%	2%	1%
Businesses/Offices	0%	1%	1%
None/Equal Mix	0%	1%	2%
Other	1%	1%	0%

Source: Readex Research; Number of Respondents in 2020: 184

## COMMERCIAL: MIXED BAG

The economic downturn resulting from the pandemic on the hospitality industry and other commercial segments negatively affected 44 percent of companies that participated in the PCT survey. Forty-six percent said it didn't have an effect on these accounts, and 10 percent reported it gave their commercial business a boost.



Source: Readex Research; Number of Respondents: 184





# PLENTY OF CHOICES IN TREATMENT OPTIONS

While the conditions under which technicians worked in 2020 were different, their approach to managing bed bugs was consistent with previous years. Insecticides continued to be the go-to treatment protocol, with 97 percent of PMPs reporting using them and 77 percent adding that insecticides were their primary means of control. The latter figure represents a 6 percent increase over our 2020 report, perhaps reflecting continuing improvements in efficacy. Meanwhile, the number of PMPs using heat as their primary treatment has declined slightly to 13 percent (compared with 15 percent in 2020 and 16 percent in 2019).

“How we treat depends on the level of infestation and the customer’s budget,” says Patrick Wyman of Epcon Lane Pest Control. “If a home is overpopulated with bed bugs, we recommend heat. Not everyone goes for that because of the cost (property managers are especially cost-conscious), and so we’ll offer them the same three-visit treatment program we recommend for smaller infestations. We use a liquid pesticide, dust and possibly steam during the first two visits and use the third visit to inspect. At that point, the home should be clear of bugs.”

Gary Andrews decided three years ago to take a different tack from the multiple service call model. After a single pesticide treatment, customers of Prudential Pest Management are told to wait 20 days before reporting any active bed bugs. “We had noticed that customers would call saying they saw bed bugs in the 20 days

## HOW DO YOU TREAT BED BUGS?

	Offer	Primary
Insecticides	97%	77%
Mattress encasements/liners	62%	0%
Monitoring	54%	1%
Vacuuuming	43%	1%
Heat	28%	13%
Steam	27%	3%
Canine detection	13%	2%
Fumigation	10%	2%
Cold treatments	4%	1%
Other	2%	1%

Source: Readex Research; Number of Respondents: 184

following treatment, but after that point, calls stopped. So now we do a one-time treatment with a three-month warranty and set customer expectations for the 20-day wait. Only two out of 10 customers call back after that time period, so we do a second treatment for them. But we’re saving eight trips we would have automatically made previously. That frees up a significant amount of time for other service calls,” Andrews says.

David Poplin prefers the one-and-done approach as well, but Legion Pest Management’s protocol of choice is fumigation. “We use a variety of treatments, but for single-family homes, fumigation is often the best. It offers immediate control and is the only all-encompassing treatment approved in our state,” he explains. “It’s more expensive than liquid applications, but 30 percent of our customers choose it anyway, in part because with California’s drywood termite problem, they see it

as a means to eliminate both pests with one service.”

## LOW PREP EASES BURDEN

Historically, it’s been tough for PMPs to get customers to do their part in controlling their bed bug infestations. Prep lists could get overwhelming in a hurry, so you never really knew what you might be walking into for that first treatment. Today, low-prep treatments, which 46 percent of survey respondents said they use, can minimize potential frustration for both parties.

“With the initial service, we don’t want to disturb the bed bugs, so there’s no prep involved,” says Ashley Roden of Sprague. “We surround the feeding area — treating around the bed, couch or other areas where the bugs are getting their bloodmeals — using dust, aerosols and other liquid treatments. We may leave a prep sheet for the second and any subsequent service calls.” ●

## BED BUG CALLBACK RATE



Source: Readex Research; Number of Respondents in 2021: 184

46%

offer low-prep bed bug services

Source: Readex Research; Number of Respondents: 184



Customers often mistake carpet beetles (right) for bed bugs.

# SOMETIMES MISIDENTIFIED, OFTEN MISUNDERSTOOD

**M**ost customers are not entomologists, nor do they have the knowledge base or experience of a PMP. So when someone calls to report bed bugs, it's important to make sure that's truly the pest they're dealing with. They might mistake any number of pests — carpet beetles, spider beetles, booklice or even fleas — for bed bugs. That's why Terminator Pest Control invites its website visitors and social media audience to share photos of the pest they believe to be a bed bug.

"The ID is critical, and we want to make it as easy as possible for people to know whether or not the insects they're seeing in their home are bed bugs," says Terminator's Kyle Stiemsma. "They often

send us photos, although they're not usually of the highest quality. In those cases, we ask if they're ever in the area of our office to drop off a sample or if they'd like us to stop and pick up a sample. Sometimes what they show us are bat bugs, which are tough to differentiate from bed bugs without a microscope. When they have bat bugs, we recommend a different course of action, beginning with an inspection of their attic and other potential roosting places."

As for misunderstanding bed bugs, although some progress has been made in educating the public about them, the notion continues that bed bugs are related to filth. "You need to be sympathetic and help them overcome this miscon-

ception," says Joe Smith of Kingfish Pest Control. "People always ask me, 'How did we get these?' I explain that bed bugs are hitchhikers — that they can be transported by you, another household member or a friend who comes for a visit. I ask if they've been to a hotel or a movie theater, or even on a bus. Once they realize that you can pick up bed bugs anywhere — in a bus station or a five-star hotel — they begin to understand that it's not a stigma." ●

**\$923**



The price tag PMPs put on a typical residential bed bug treatment in 2021 represents a 3.5 percent increase over 2020 (\$892) and 2019 (\$893) — not a bad deal for customers when you consider the overall U.S. inflation rate exceeded 5 percent this summer.

[Source: <https://www.usinflationcalculator.com/inflation/current-inflation-rates/>]

Source: Readex Research; Number of Respondents: 184

## ABOUT THIS SURVEY

The PCT 2021 State of the Bed Bug Control Market survey was sponsored by Bayer and compiled by Readex Research, a privately held research firm in Stillwater, Minn.

A sample of 6,000 pest control company owners, operators, executives and technical directors was systematically selected from the PCT database. Data was collected from 220 respondents — a 4 percent response rate — via an online survey from Aug. 18-30. The margin of error for percentages is plus or minus 6.5 percentage points at the 95 percent confidence level. Charts may not add up to 100 percent due to rounding.

Barricor<sup>®</sup>  
SP

Stay ahead of the  
*competition*



Innovation  
*that stands up.*

*Solid particle (SP) formulation means better bioavailability to pests*

*Superior performance on complex surfaces for fewer callbacks*

*Efficacy at low dose rates stretches your dollar — 32 ounces treats 128 homes\**

*Spray with comfort and confidence — no signal word or PPE requirements\*\**

\*Based on 1,000 sq. ft. treating area per home.

\*\*Always comply with state and company policy regarding PPE.

ALWAYS READ AND FOLLOW LABEL INSTRUCTIONS

Bayer Environmental Science, a Division of Bayer CropScience LP, 5000 CentroGreen Way, Suite 400, Cary, NC 27513. For additional product information, call toll free 1-800-331-2867, [www.environmentalscience.bayerusa.com](http://www.environmentalscience.bayerusa.com). Not all products are registered in all states. Barricor<sup>®</sup>, Bayer and the Bayer Cross are registered trademarks of Bayer. ©2011 Bayer CropScience LP. PPM-0121-04M-0113-A-14