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# 2023 STATE OF THE BED BUG CONTROL MARKET REPORT

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- Mixed Market
- Prep: Important, Not Always Attainable
- More Tools are Better
- Resistance? Rotate
- Hello, Revenge Travel!
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**84%**  
of pest control  
company locations  
offer bed bug  
control services.  
*Source: Readex Research;  
Number of respondents: 167*

# MIXED MARKET

The COVID-19 pandemic affected bed bug control. Lockdowns limited the spread of the pests, and people with existing bed bug problems often weren't comfortable having technicians in their homes to eliminate them. As such, bed bug revenue weakened at many pest control companies.

With the pandemic now in the rear-view mirror, however, normal activities have resumed and bed bug revenue is looking up at some companies.

Compared to last year, 52 percent of pest management professionals (PMPs) expected the frequency of bed bug calls and jobs at their company locations to increase, found the 2023 PCT State of the Bed Bug Control Market survey.

That's the case at Modern Exterminating, Columbia, S.C. "It slowed down during COVID, but it's come back and we're doing more bed bug jobs a week now than we've done in years," said Vice President Melanie Matthews.

It helps that Modern Exterminating operates in a college town where people constantly are moving in and out of rental properties. People also are traveling more and bringing the pests back home. "I think we're seeing some effects from that," said Matthews.

Jaime Pilbeam — along with 31 percent of PMPs — expected the volume of bed bug work at his company to remain the same as last year. Pilbeam owns Superior Pest Control, Grand Rapids, Mich., which generates about 20 percent of its revenue from controlling bed bugs in multi-family housing, medical facilities and nursing homes.

On average, bed bug control services accounted for 12.3 percent of revenue at pest control company locations last year. And 41 percent of PMPs said these services became a more significant portion

of the business over the past five years.

Fewer PMPs feel this way, however. In fact, 21 percent reported that bed bug services became less significant to their location, nearly triple the 8 percent who shared this sentiment in 2022.

Bed bug work is "important, but I wouldn't say it's significant" to the business, said Randy Moffat, director of operations, United Pest Solutions, Kenmore, Wash. "It is something we offer because we want to be able to take care of our customers. For a lot of people, having bed bugs really messes with their psyche," he explained.

At United Pest Solutions, bed bug revenue is down about 20 percent from last year and growth of the service has "plateaued," said Moffat.

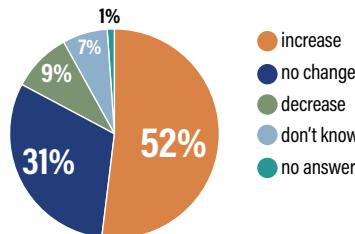
PMPs said a number of factors were holding back growth of bed bug services at their company locations.

These included lower customer demand (26 percent), increased competition (25 percent) and lack of technicians to do the work (25 percent). Getting the word out (14 percent) was also a factor.

Eighty-four percent of pest control company locations offered bed bug control services, found the PCT survey. 🍌

## RING, RING!

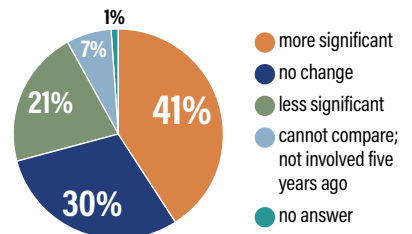
Compared with last year, do you think your market area will see an overall increase or decrease in the number/frequency of bed bug calls and jobs this year?



Source: Readex Research; Number of respondents: 140

## HOW DO YOU LIKE ME NOW?

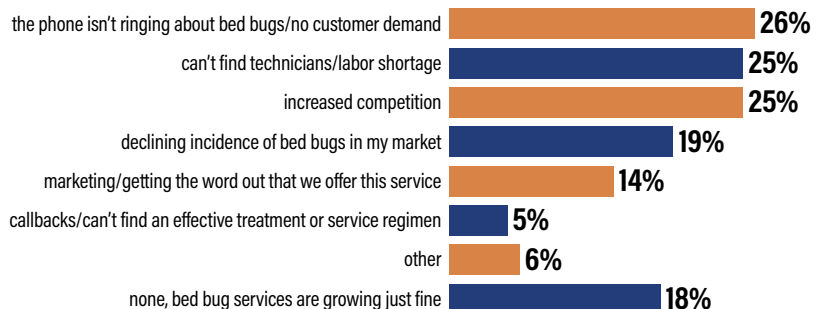
In the past five years, have bed bug control services become a more or less significant portion of your location's business?



Source: Readex Research; Number of respondents: 140

## GROWTH HURDLES

What challenges are holding back the growth of your location's bed bug services?



Source: Readex Research; Number of respondents: 140; Respondents could select more than one answer



# PREP: IMPORTANT, NOT ALWAYS ATTAINABLE



**P**reparing sites prior to bed bug treatment is key to eliminating the pests. The degree of prep required, however, has changed over the years and varies from company to company.

Most company locations today offer a low-prep option for bed bug treatment, reported 56 percent of PMPs in the 2023 PCT State of the Bed Bug Control Market survey.

Elite Pest and Termite Control, Pataskala, Ohio, doesn't require residents to pull clothes out of closets or drawers and then launder and bag them. Instead, they are asked to clear the floor and bed and to pull items away from baseboards, so technicians have access to perform treatment.

"You still find people who don't want to do a minimal amount of prep. That's always going to be an issue," admitted owner Brad Sparks.

If a unit is not prepared for service, he advises technicians not to perform the treatment. "In my opinion [prep] can make or break the service. Don't compromise on the prep," said Sparks.

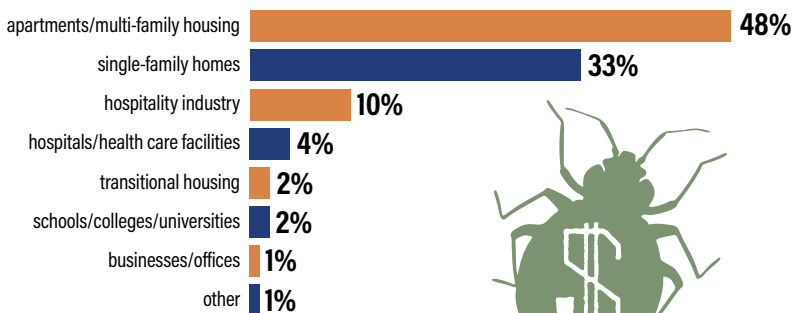
Q36 Pest Control, Oak Ridge, Tenn., also requires minimal prep. If technicians notice an area that needs more attention after the initial treatment, they'll ask customers to perform specific prep for that spot before the follow-up visit to help eliminate the pests faster.

"Communication is key in these situations. We help them understand what they can do to help speed the process up," said Zack Yassu, director of operations for the company.

This is how Jaime Pilbeam, Superior Pest Control, sells customers on prep: The more they help, the faster and better the results will be, and the sooner his

## HOUSING WAS NO. 1

Which one of these bed bug markets represented the largest portion of your location's bed bug revenue in 2022?



Source: Readex Research; Number of respondents: 140



technicians will be gone.

"If you get the buy-in from the customer, you have effective treatment," said Pilbeam, who recently spoke to the Rental Property Owners Association of Michigan about bed bugs. "Part of our job is education," he reminded.

A customer's willingness to prepare the site for treatment shows their commitment to solving the problem, said Randy Moffat, United Pest Solutions.

"My experience is, if I have somebody prep, we're going to get better participation, which is going to give us better results," he said.

Before any heat or chemical treatment is performed by Janssen Pest Solutions, Des Moines, Iowa, customers must sign a legal agreement and initial that they've received the prep sheet. This acknowledgment hopefully spurs people to act.

If not, "we do charge if there's been no prep and it is high clutter," said owner Nancy Janssen.

Scott Elsner, owner, Bay Pest Solutions, Green Bay, Wis., only takes on

jobs if customers are willing to work with a third-party canine detection service and do the prep, the degree to which depends on the clutter and severity of the problem.

Good prep begets successful treatment, said Elsner. But "what we've been running into sometimes is people don't want to prep the jobs properly and then they expect miracles," he said.

PMPs said this is frustrating because they know their treatment protocols will eliminate the pests. "The only times that we have had trouble is when the customer hasn't held up their end," said Lee Ruble, owner, Q36 Pest Control.

Most issues with lack of preparation occurred in multi-family housing, said PMPs. This also was where most bed bug work was performed.

According to PMPs who participated in the PCT survey, apartments/multi-family housing (48 percent) and single-family homes (33 percent) generated the largest portion of bed bug revenue for company locations last year. ●

# Envu is Bed Bug HQ

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## Complete confidence starts with accurate detection

As bed bug infestations rise, the need for accurate detection methods becomes more critical for customers and pest control operators alike. While there has long been a variety of detection options, there is no doubt that the industry as a whole has been lacking an alternative that checks all the boxes. Until now.

**70% of PMPs felt that they were just  
"mostly" accurate in detecting bed bugs.'**

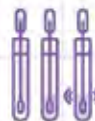
90%

**Detects even low-level bed bug  
infestations with over 90% accuracy<sup>2</sup>**

**TRUDET<sup>™</sup>**  
Bed Bug Rapid Test



**1. Swab**



**2. Activate**



**3. Test**

### **USES:**

Matresses  
Headboards  
Chairs  
Piping

- ✓ Results in under five minutes
- ✓ Discreet
- ✓ Cost-effective



## Innovations in bed bug treatment

A diversified approach is the best way to effectively treat bed bugs.

That's why Envu is introducing a new product to their suite of solutions: a dust product, coming in 2024. Below, you can find the benefits of Envu solutions as well as tips on where to apply this new dust product.

**"If we use a combination approach and use all the tools at our disposal, we can realize the benefits of all these tools together."**

Alex Ko, Ph.D., *Envu Product Development Manager*

Type	Effectiveness	Residual control	Fast-acting	Ease of use
Heat	+++	×	✓	Hard
Sprays	+++	1-3 months	✓	Easy
New Dust	+++	Years	✓	Medium

**#1** The #1 product for treating bed bug infestations<sup>3</sup>



- ✓ Prevents infestations for up to six months
- ✓ Dual-action technology
- ✓ Kills even pyrethroid-resistant bed bugs and eggs

**10 MIN** Starts eliminating bed bugs in 10 minutes<sup>4</sup>  
**NEW DUST COMING 2024**

**USES:**  
Hard-to-reach places  
Baseboards  
Outlets  
Cracks  
Crevices

- ✓ Provides long-lasting control
- ✓ Complements the coverage of Temprid® FX insecticide



**1. Inspect**



**2. Apply**



**3. Eliminate**



Explore  
Bed Bug HQ

<sup>1</sup>2023 State of the Bed Bug Control Market Reader Research. <sup>2</sup>Ko, Alexander & Choi, Dong-Hwan. Development of a lateral flow test for bed bug detection. Scientific Reports 10:13376 (2020). <sup>3</sup>Based on the percent of respondents who mention Temprid FX. Source: <https://nmpapestworld.org/default/assets/File/newsroom/magszine/2015/Nov-Dec%2015.pdf>. <sup>4</sup>Protocol DE18USAXKD.

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# MORE TOOLS ARE BETTER



To successfully control bed bugs, PMPs said it was necessary to use a variety of tools and treatment methods.

“I think nowadays, you almost have to. I don’t think there’s that one perfect answer” to solve bed bug problems, said Jaime Pilbeam, Superior Pest Control.

According to the 2023 PCT State of the Bed Bug Control Market survey, 92 percent of PMPs said their locations used conventional insecticides in their bed bug control regimens. This was the primary treatment for 70 percent.

Mattress encasements and active mattress liners were used by 62 percent of pest control company locations. “I always try to recommend mattress covers and box spring covers,” said Scott Elsner, Bay Pest Solutions. He only installs the covers that he sells, however.

Vacuuming (51 percent), monitoring (46 percent), and treatments using heat (31 percent) and steam (28 percent) were regularly employed.

Nineteen percent of PMPs used biological or biopesticide treatments to con-

trol the pests. For Brad Sparks, Elite Pest and Termite Control, biopesticide is his go-to treatment.

“It’s got a decent residual and it doesn’t require as much prep, especially when you’re dealing with tenants who don’t want to follow protocols and preparation checklists,” he said.

Canine detection was used by 15 percent of company locations, reported PMPs. Janssen Pest Solutions, which acquired its first bed bug dog in 2008, has two dogs to identify bed bugs and ensure sites are bed bug-free during follow-up visits. “That’s how we determine success,” said Nancy Janssen.

Elsner, who works with a third-party canine inspection company, also is a fan. “I can really speak highly of these dogs,” he said. He won’t take on bed bug work in multi-family housing unless the client is willing to use the canines.

“As long as the dog’s involved, I’ll take them because then I know that the property managers are taking it serious, and they want to get rid of the problem and not just throw a Band-Aid on it,” he said.

In follow-up interviews, PMPs said bed bug control can involve about three service visits to inspect, treat and reinspect the site. The entire process can take about six weeks. Heat treatment typically takes less time.

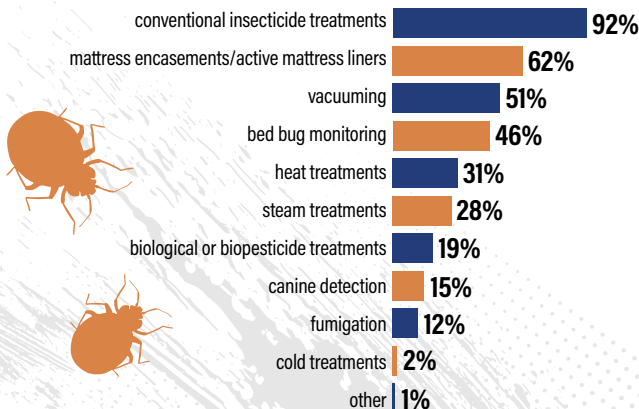
Using steam and vacuuming and performing a chemical follow-up treatment can speed up the process, said Pilbeam, who sends two-person teams to bed bug jobs. With two people, it’s easier to lift mattresses and furniture. “A team effort goes a heck of a long way,” he said.

According to the PCT survey, 43 percent of PMPs said bed bug treatments were performed year round at their locations; 36 percent said summer was the busiest time of year for this service.

The average callback rate for bed bug control jobs was 4.5 percent. 🐛

## BRING ON THE TOOLS!

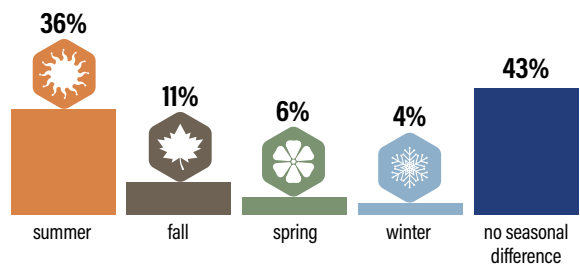
Which of these treatments or service regimens does your company location use to control bed bugs?



Source: Readex Research; Number of respondents: 140; Respondents could select more than one answer

## BUSY YEAR ROUND

Which season tends to be the busiest for providing bed bug control services at your location?



Source: Readex Research; Number of respondents: 140

**4.5%** average callback rate for bed bug control jobs

Source: Readex Research; Number of respondents: 140





# RESISTANCE? ROTATE

**M**ost PMPs said they have encountered insecticide resistance in bed bug populations but were not overly concerned about it.

The 2023 PCT State of the Bed Bug Control Market survey found that 43 percent of PMPs rarely encountered bed bug resistance in their market area and 22 percent said it was a manageable problem. Only 2 percent said resistance was a serious, difficult-to-manage issue. Nearly a third (32 percent) of PMPs said they had not encountered resistance in their market areas.

To prevent resistance from developing in bed bug populations, Superior Pest Control technicians use a different chemical product, featuring a different active ingredient and mode of action, for the initial and follow-up treatment.

“You have to have a multi-faceted approach. If you’re just using one method or one particular chemical, I think you are going to run into resistance,” said Jaime Pilbeam, who was aware of some resistance occurring in his market be-

cause “people aren’t rotating chemicals.”

Of the 47 percent of PMPs who said their company locations had implemented a treatment protocol to prevent bed bug resistance, 89 percent said product rotation was a core practice.

Brad Sparks, Elite Pest and Termite Control, experienced bed bug resistance to liquid pyrethrin at a low-income housing complex. “We were finding that because we were coming in behind previous companies who had been applying those products,” he said.

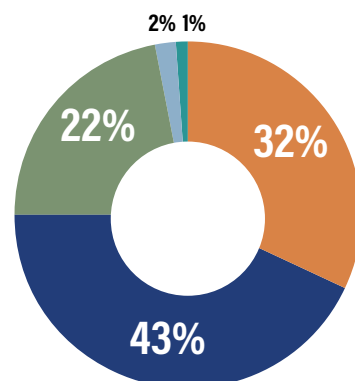
When Sparks switched to a biopesticide for these jobs, his success rate improved significantly.

Q36 Pest Control also added biopesticide to its product mix to address resistance. “I think bed bugs seem to be pretty resilient creatures. They get used to what we’re using so we’re having to adjust,” said Lee Ruble.

PMPs said the pests also can become resistant to the over-the-counter products that residents apply to try to fix the problem on their own. 🐛

## RESISTANCE IS NOT A MAJOR ISSUE

How would you characterize the level of bed bug resistance in your market area?

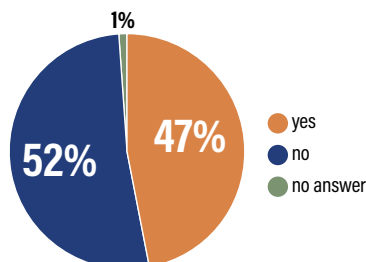


- we have not encountered bed bug resistance
- we seldom encounter bed bug resistance
- bed bug resistance is a problem, but a manageable one
- bed bug resistance is a serious problem, difficult to manage
- no answer

Source: Readex Research; Number of respondents: 140

## WHAT'S YOUR PLAN?

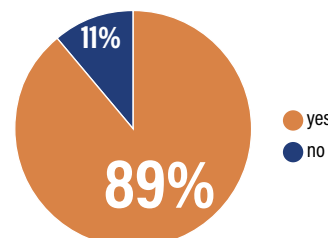
Has your location implemented a bed bug resistance treatment protocol?



Source: Readex Research; Number of respondents: 140

## YES TO PRODUCT ROTATION

Is product rotation part of your location's bed bug resistance treatment protocol?



Source: Readex Research; Number of respondents: 66

# HELLO, REVENGE TRAVEL!

**P**s' outlook for bed bug control was generally positive. According to the 2023 PCT State of the Bed Bug Control Market survey, 41 percent expected revenue generated by bed bug services to increase at their locations in the year ahead, while 56 percent said revenue would remain unchanged.

A surge in post-pandemic domestic and foreign travel may help boost demand for bed bug control services. A January 2023 survey commissioned by Forbes found that 49 percent of Americans planned to travel more this year. Consumer media dubbed this "revenge travel" as people make up for time and experiences lost to the pandemic.

"It is so easy to move [bed bugs] from place to place as we increase travel," said Lee Ruble, Q36 Pest Control, who expected his bed bug revenue to increase. "I think we offer a good value for our service, and so I think we'll be able to capture more market share," he said.

Melanie Matthews, Modern Exterminating, anticipated continued growth in bed bug services, as well. "That's what we're thinking will happen as people continue to travel, as our community continues to up the rental game. We think it's something that we're going to see for quite a while," she said.

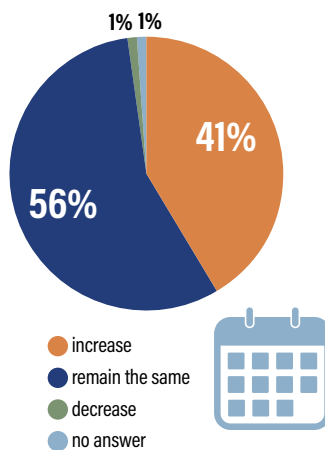
Prices for bed bug services increased over the past three years, reported 56 percent of PMPs. In 2023, the average price for a typical residential bed bug treatment was \$961, up from \$908 in 2022. 🐛



**\$961**  
 average price  
 charged for a  
 typical residential  
 bed bug treatment  
*Source: Readex Research;  
 Number of respondents: 140*

## A SAME OR BETTER FORECAST

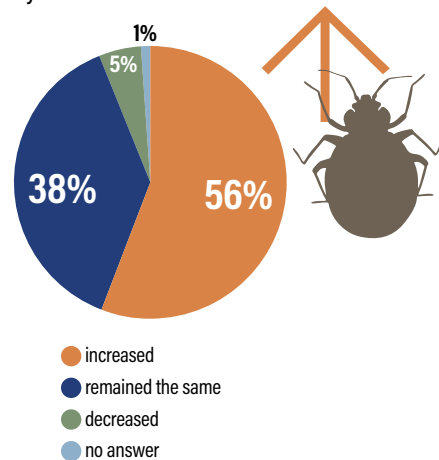
How do you expect the percentage of revenue generated by your location's bed bug control services to change in the next 12 months?



*Source: Readex Research; Number of respondents: 140*

## CHARGING MORE

Has the pricing for bed bug services at your location increased, decreased, or remained unchanged in the past three years?

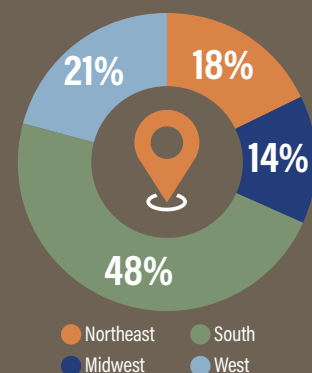


*Source: Readex Research; Number of respondents: 140*

## About the Survey

Sponsored by Envu, the 2023 PCT State of the Bed Bug Control Market study was conducted by Readex Research, a privately held research firm based in Stillwater, Minn. A sample of 4,352 pest control company owners, executives, technical directors and managers was systematically selected from the PCT circulation file. Data was collected from 167 respondents — a 2 percent response rate — via online survey in July 2023, with 140 respondents stating their company location offered bed bug control services. The margin of error for 140 respondents is plus or minus 8.2 percent at the 95 percent confidence level. Charts may not add up to 100 percent due to rounding.

## WHERE RESPONDENTS WERE LOCATED



*Source: Readex Research; Number of respondents: 167*