



The State of Pool Service 2026

A More Disciplined, More Digital Industry



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Executive letter

Dear Pool Professionals,

As we look back on the past year, one thing is clear: pool service continues to evolve. Demand remains strong as pool owners place even greater value on clean, safe, ready-anytime pools that support how they live, gather, and recharge. At the same time, the bar for what great service looks like keeps rising. That combination brings pressure, but it also unlocks real opportunities for businesses built to meet it.

At Skimmer, we're fortunate to work alongside thousands of pool pros who keep raising the standard. You're not only keeping up with change, you're leading it. We see it in crews becoming more efficient without cutting corners, owners building stronger customer relationships, and teams using better systems to create more reliable operations. The professionalism in this industry is growing, and that matters—for your customers, for your teams, and for the long-term health of your business.

This year's State of Pool Service Report reflects that momentum. The themes are familiar, but they're taking on new urgency: the need to operate efficiently, attract and retain great talent, deliver consistent quality at scale, and communicate clearly with customers who expect a modern experience. These aren't trends on the horizon; they're the realities shaping day-to-day work in the field, and they're defining what success will look like moving forward.

That's why Skimmer is continuing to invest with intention. We're building to help the industry keep moving forward; making it easier to run strong routes, keep teams aligned, stay on top of billing and cash flow, and deliver a level of service that earns trust season after season. We're also investing beyond the product. We're sharing insights, highlighting best practices, and bringing pool pros together through the Pool Deck Community and live events so you can learn from each other and keep pushing the profession ahead.

Looking to 2026, we believe the future of pool service will reward the operators who combine craftsmanship with operational discipline. The work will always be hands-on, but the way the best businesses run will look more connected, more measurable, and more resilient.

Pool service is evolving quickly, and the teams that embrace that shift will shape what comes next. We're grateful to be in your corner, and we don't take your trust lightly. Thanks for letting us learn from your feedback and build alongside you. We're looking forward to supporting you through another year of growth, stronger operations, and pride in the work.

Sincerely,

—**Jack Nelson**
CEO, Skimmer



What you'll find In this report

For the third edition of the State of Pool Service Report, we surveyed more than 1600 pool pros—both Skimmer customers and non-customers—to understand how they are:

- Applying disciplined strategies to achieve their 2026 growth targets amid a cautious economic climate.
- Structuring their operations and refining how they price and deliver services.
- Responding to a market that continues to evolve through technology adoption and increasing customer expectations.

This report offers a detailed look back at 2025, including year-over-year comparisons, as well as a forward view into 2026. It integrates survey responses, platform insights drawn from the activity of more than 35,000+ Skimmer users servicing over 1,000,000+ pools each month, and broader industry research.

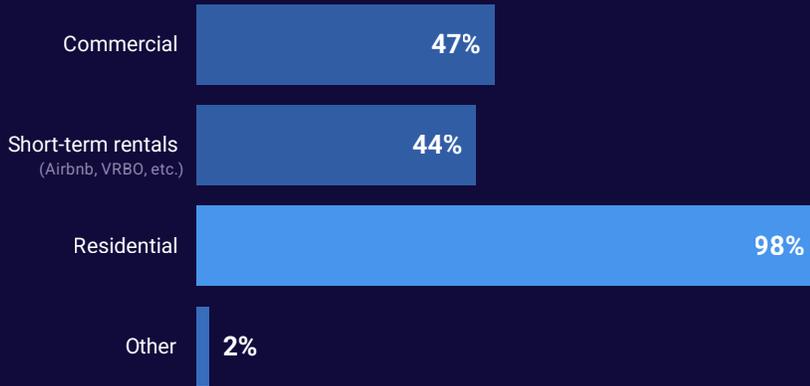
Because figures are rounded, certain percentage totals may not equal 100%. All comparisons are calculated from full values rather than rounded figures.



SURVEY DEMOGRAPHICS

Respondent firmographics

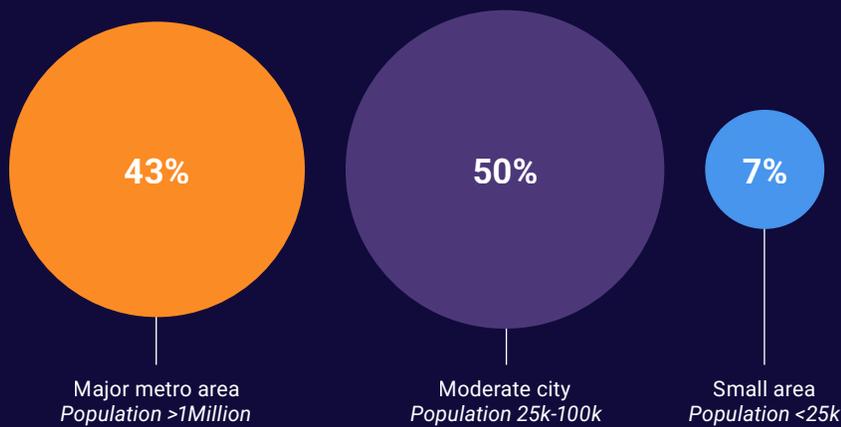
Types of customers serviced



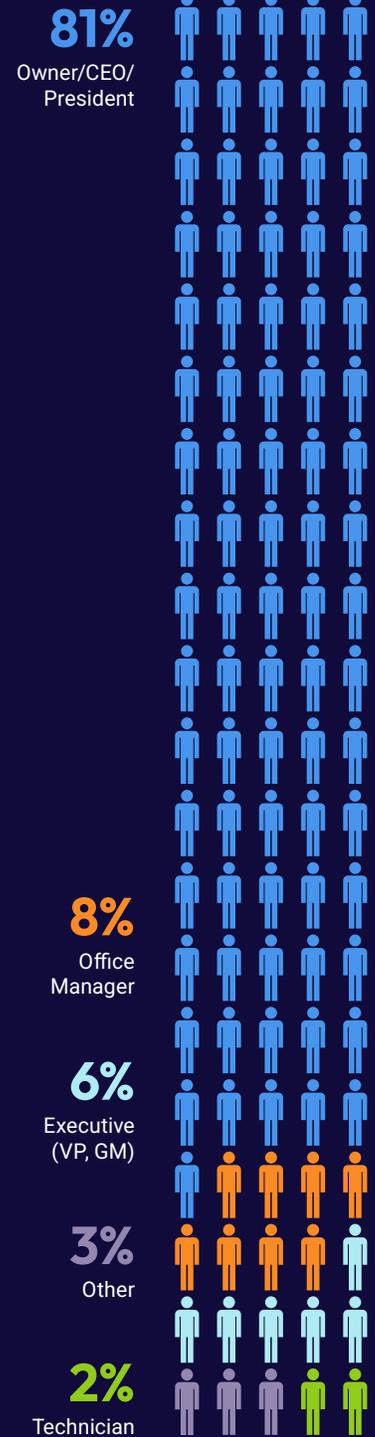
Open year-round



Size of area serviced



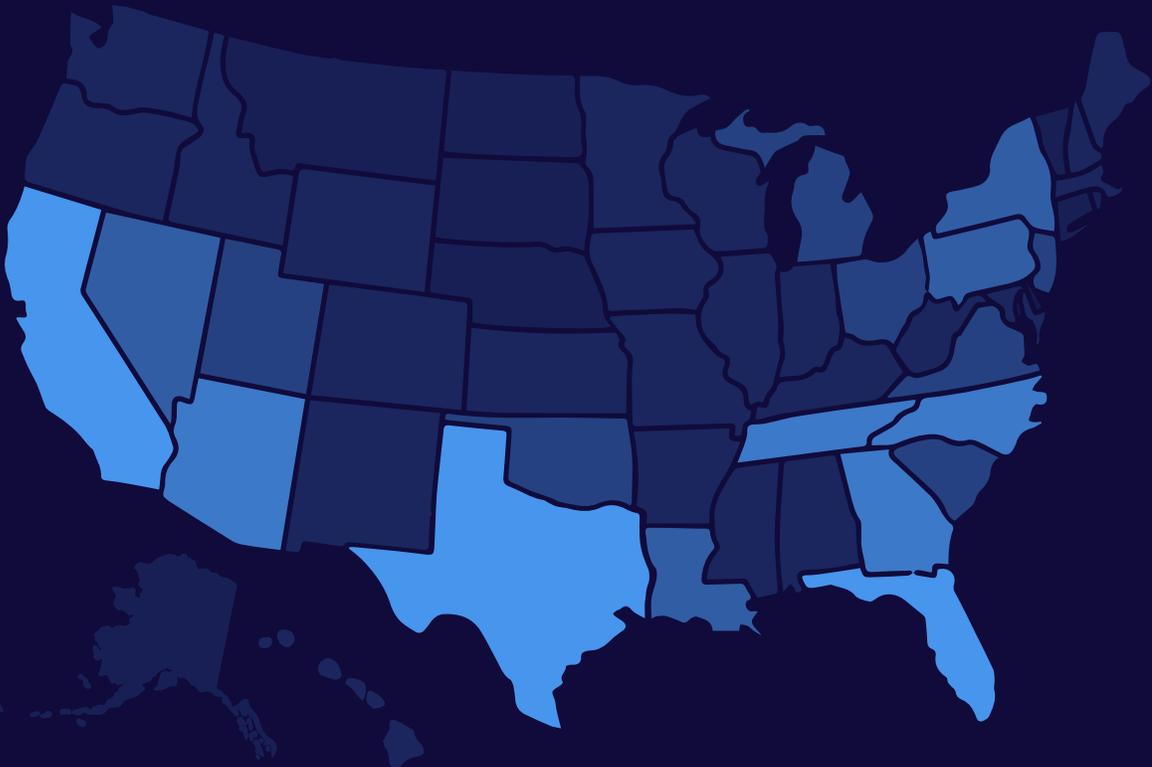
Current role



SURVEY DEMOGRAPHICS

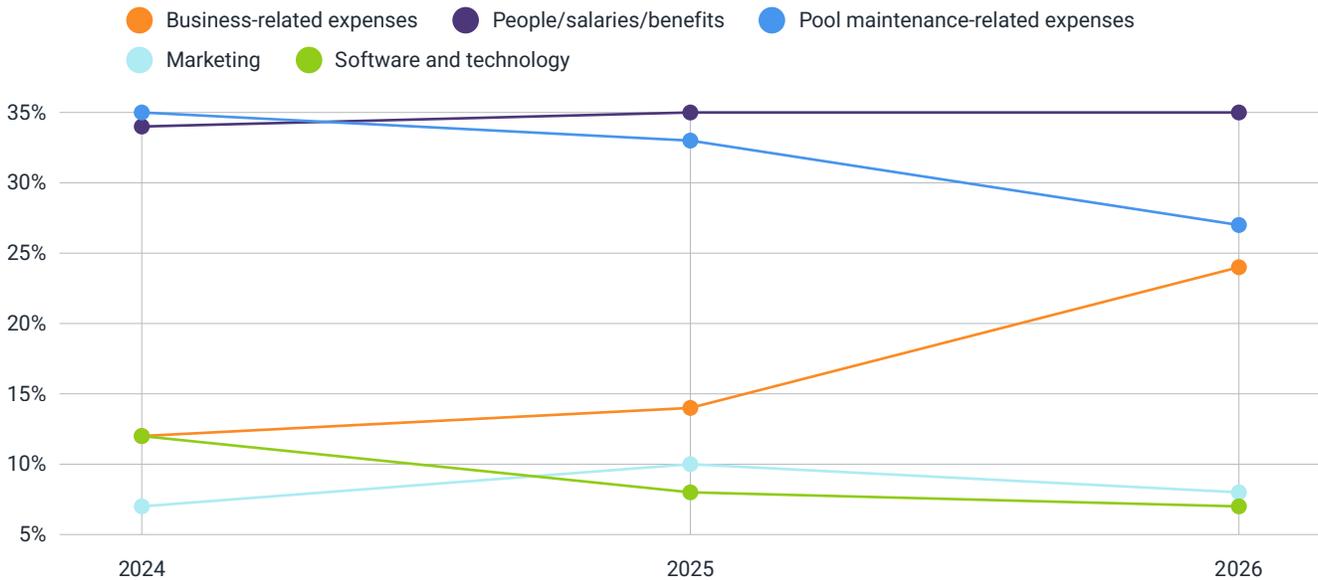
Respondents By State

Texas	20%	Oklahoma	1%	West Virginia	<1%
California	17%	Colorado	<1%	Wisconsin	<1%
Florida	16%	Indiana	<1%	Iowa	<1%
Arizona	8%	Kentucky	<1%	Washington	<1%
Georgia	4%	Hawaii	<1%	Maine	<1%
North Carolina	3%	Alabama	<1%	New Hampshire	<1%
Tennessee	3%	Illinois	<1%	Wyoming	<1%
New York	2%	Massachusetts	<1%	Alaska	0%
Nevada	2%	Oregon	<1%	Connecticut	0%
Pennsylvania	2%	Arkansas	<1%	District of Columbia (DC)	0%
Louisiana	2%	Kansas	<1%	Montana	0%
Outside of USA	2%	Mississippi	<1%	Nebraska	0%
South Carolina	1%	Delaware	<1%	North Dakota	0%
Utah	1%	Idaho	<1%	Rhode Island	0%
Michigan	1%	Maryland	<1%	South Dakota	0%
Ohio	1%	Minnesota	<1%	Vermont	0%
Virginia	1%	Missouri	<1%		
New Jersey	1%	New Mexico	<1%		



Budgets

Over the past three years, there has been a clear shift toward business-related expenses and away from maintenance and software as a share of the overall budget.



Business-related expenses rose from 12% (2024) to 14% (2025) and then to 24% (2026). This points to inflation and overhead pressure: insurance, fuel, vehicles, rent, and professional services tend to grow steadily and can easily outpace revenue growth. Many operators are also formalizing operations by securing better insurance and financing more vehicles, which naturally inflates this category.

People/salaries/benefits stay in a fairly tight band: 34% → 35% → 35%. The share is essentially stable over three years. Wages and hiring challenges remain real, though payroll remains relatively stable while other categories fluctuate around it.

Pool maintenance-related expenses fell from 35% (2024) to 33% (2025) and then to 27% (2026). This likely reflects chemical price normalization following earlier spikes, tighter inventory control, and wider adoption of “plus chems” or

pass-through models, in which chemical costs are billed directly rather than absorbed as a core operating expense.

Marketing fluctuates from 7% (2024) to 10% (2025) and then 8% (2026). This looks more like tactical shifts in how aggressively companies pursue growth in a given season rather than a structural reset.

Software and technology move from 12% (2024) down to 8% (2025) and 7% (2026). The most plausible story is leverage: once a company is on modern software, the cost grows slowly while route count and revenue grow faster. Software remains essential and may increase in absolute dollars, while its share of the budget pie shrinks as overhead consumes more of the pie.

Executive Summary

1 A maturing industry: Professional expectations and strong underlying demand

Pool service is framed as a large, durable market that's continuing to professionalize. As expectations rise—especially around communication and proof-of-work—operators are leaning into better systems, steadier pricing discipline, and tech-enabled workflows. The takeaway is that confidence is improving, and the businesses pulling ahead are building structure that can scale.

2 What's keeping owners up at night: Pressure points and customer expectations

Pros are more optimistic, but they're clear-eyed about what could disrupt the year—economic uncertainty, labor constraints, and rising costs remain the leading pressures. At the same time, pool owners expect greater transparency, consistency, and digital communication, rewarding businesses that operationalize quality rather than rely on heroic growth efforts. Growth is tied to stronger execution: clearer processes, better tools, and a more intentional customer experience.

3 Smarter growth: Efficiency first, then expansion

Growth strategies are shifting from “add more pools” to “grow smarter.” Many businesses are prioritizing efficiency, selective marketing, and expanded services, with some willing to trim low-margin accounts to improve profitability. Pricing increases remain measured (often under 10%), and we emphasize that maintaining margins requires understanding cost-to-serve and communicating changes confidently, especially as chemical billing structures evolve.

4 The talent reality: Hiring carefully and building consistency

Hiring intent is trending up, but the tone is controlled: most plan to hire or hold steady rather than overextend. Teams remain lean, and the report stresses that the scarcity of qualified technicians remains a defining constraint, making onboarding, training, and basic systems critical for sustainable growth. The bigger message is that scaling depends on repeatable performance, not simply adding headcount.

5 Marketing that works: Referral-led, local, and measurable

Marketing remains pragmatic: referrals lead, and most businesses plan to keep budgets modest while focusing on channels that reliably bring in people looking for pool care, like SEO and paid search. As tactics become more digital, more owners are sharing or outsourcing execution, but the strategy stays local and reputation-driven. The report encourages simple, structured programs—especially referrals and disciplined planning—over scattered experimentation.

6 The modern ops stack: Fewer tools, better workflows, practical AI

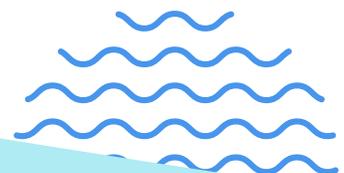
Software adoption is now the norm, with most businesses pairing field operations solutions with accounting and selectively adding tools. AI is moving from curiosity to cautious experimentation, with interest centered on time savings and consistency (paired with guardrails around reliability, privacy, and revenue-critical workflows). The throughline is consolidation and control: tighter processes, fewer systems, and automation where it removes friction.

7 Pricing models in motion: Monthly billing, chemical clarity, stronger cash flow

Monthly billing continues to dominate because it supports predictability for both customers and operators. The biggest evolution is how chemicals are handled, with more businesses moving away from fully “included” pricing toward itemized or hybrid models that better match real costs. Repair deposits are also becoming more common, reinforcing a broader shift toward healthier cash flow and reduced financial risk.

8 Consolidation on the horizon: The roll-up era meets the independent operator

Private equity roll-ups are more visible, but sentiment is mixed and often neutral, reflecting both curiosity and concern. Many owners remain selective about selling while demand is strong and operational improvements can increase business value. The report offers a framework for evaluating offers realistically, weighing the benefits of scale against risks to service quality and customer experience.



Introduction: A market settling into its next phase

As 2026 approaches, the pool and spa service sector shows a clear pattern: businesses are stabilizing, maturing, and running with more structure than ever. Demand remains healthy, and operators are leaning into systems that keep finances predictable and communication smooth. The story that began last year—an industry stepping into a more professional era—continues with greater confidence and discipline.

By the numbers:

The pool service opportunity

- Roughly **10.7 million pools** in the U.S., including about **10.4 million residential pools**.¹
- According to Skimmer’s Pool Owner Report, residential pool owners spend an average of **~\$1,700 per year on maintenance**, a built-in base of recurring revenue.²
- A U.S. pool cleaning market of **about \$7.2 billion today**, on track for **7.8 billion by 2029**.³
- A **\$16.5 billion** U.S. pool construction industry in 2025, growing around **3% annually** and keeping the installed base rising.⁴

A market that’s stabilizing and supporting steady demand

Demand across the home services sector has begun to look more consistent, and pool service often benefits from that stability because maintenance is embedded in ownership.⁵ Once a homeowner has a pool, recurring care remains a requirement, which helps service providers stay

resilient even when spending patterns elsewhere soften. Many business owners who navigated uncertainty over the past two seasons now have clearer visibility into customer behavior—retention held up, repair work stayed steady, and cancellations were manageable. That lived experience is translating into a more confident outlook, with expectations shifting from “same” to “more” on revenue.

Even so, residential pool-related spending still reflects broader economic conditions. When household budgets tighten, homeowners tend to delay discretionary projects, scale back upgrades, and look harder at optional add-ons—while continuing to prioritize core maintenance that protects the asset and keeps the pool usable. The inflationary pressure of recent years demonstrated how quickly confidence can erode and how that can dampen non-essential spending, creating uneven demand for higher-ticket repairs, renovations, and premium service levels.

Looking ahead, several tailwinds could support stronger usage and spending. Growth in per-capita disposable income, expanded leisure time, and broader consumer confidence can increase discretionary budgets, encouraging homeowners to invest more in their backyard lifestyle.⁶ That can translate into more frequent use, higher standards for water quality and reliability, and greater willingness to purchase enhancements like automation, heating, resurfacing, and equipment upgrades. A continued emphasis on health and fitness can also play a role: swimming remains a low-impact, repeatable form of exercise, and homeowners who prioritize wellness are more likely to view their pool as a year-round routine rather than a seasonal luxury.

Finally, the construction pipeline continues to expand the addressable market. New residential development increases the number of homes with pools and pool-ready communities, adding to the long-term base of properties that require ongoing service. Over time, that growth supports sustained demand for maintenance and repair, while creating more opportunity for providers to upsell higher-value projects as homeowner budgets and confidence improve.

What the new data makes clear

- Confidence is rising. More than eight in ten pros expect higher revenue in 2026 than in 2025.
- Price moves stay modest. Most plan mild service increases under 10%.
- Hiring momentum is building. Roughly 60% expect to bring on new staff in 2026.
- The economy looms large. Pros still name broader economic shifts as the biggest variable in their year.
- Marketing stays scrappy. Fewer than half of the companies surveyed invest in paid efforts, and those who do keep budgets lean. Referrals, local search, and social platforms continue to carry the weight.
- Software has become standard, with more and more companies relying on accounting tools and all-in-one platforms for routes, billing, and customer communication.
- AI is moving from curiosity to utility. Owners are seeing real operational gains, though cost, setup, and reliability remain concerns.

The market mood: Solid demand, smarter operators

The fundamentals haven't changed: a large, steady base of pool owners continues to keep

demand strong. What has changed is how operators are responding to pressure. Rising costs and ongoing labor constraints are forcing tighter planning, and many pros still point to the economy, expenses, and staffing as the variables most likely to shape the year ahead.

Even so, growth expectations remain resilient because expansion is looking more intentional. Instead of chasing unchecked scale, companies are leaning into disciplined pricing, measured hiring, and efficiency gains. Compared to the post-pandemic spike, growth may be cooler, but it's also settling into something healthier: more predictable, easier to forecast, and easier to manage over the long haul.

Aging pools: A built-in tailwind for higher-margin work

Another demand driver is sitting in backyards everywhere: an aging installed base. As equipment and surfaces decay or reach end-of-life, routine maintenance naturally becomes opportunities for repair and renovation. For operators, this aging stock creates a clear path to diversify beyond weekly service by building a stronger repairs pipeline and adding high-margin services that increase revenue per customer without relying solely on adding new routes.

“Companies are leaning into disciplined pricing, measured hiring, and efficiency gains.”

What this means for 2026: The three big themes

Disciplined growth

Pros feel positive about the coming year, and their decisions—pricing, hiring, expansion—reflect deliberate moves designed around efficiency.

Operational consistency

Billing models, software stacks, and communication standards are aligning across the industry, driving more predictable operations.

Technology as a force multiplier

Software and AI are moving from side projects to core infrastructure, helping pros automate admin work, tighten margins, and deliver a more consistent experience at scale.

¹ Pool & Hot Tub Alliance (PHTA). U.S. Swimming Pool Inventory Data. Bethesda, MD: Pool & Hot Tub Alliance. Summary figures (10.7 million total U.S. pools; 10.4 million residential) reported in RubyHome, "Swimming Pool Statistics," 2025, which attributes these numbers to PHTA.

² Skimmer. The 2025 Pool Owner Report. Austin, TX: Skimmer, 2025.

³ IBISWorld. Swimming Pool Cleaning Services in the US. Industry market research report, IBISWorld.

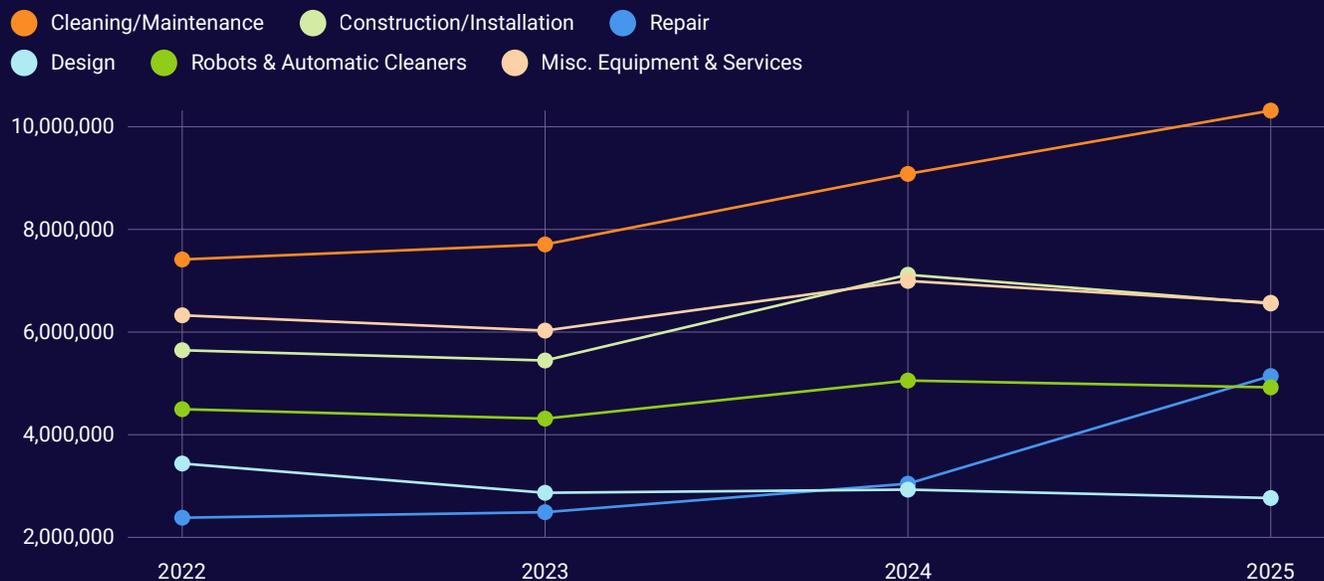
⁴ RenoSys, "Swimming Pool Statistics & Industry Insights (2025)," RenoSys, April 10, 2025.

⁵ IBISWorld. Swimming Pool Cleaning Services in the US. Industry market research report, IBISWorld.

⁶ IBISWorld. Swimming Pool Cleaning Services in the US. Industry market research report, IBISWorld.

SIDEBAR

What the search data says about pool care trends



Overall demand for pool care is climbing again

- Total annual searches across these pool categories are up 22% from 2022 to 2025 (29.7M → 36.3M).
- There was a small dip in 2023, then a strong rebound in 2024 and continued growth into 2025.
- Interest in pool care is not fading post-pandemic; it is normalizing and then growing from a higher base.

SIDEBAR CONTINUED**Cleaning and water care are the dominant, fast-growing needs**

- Cleaning, maintenance, and water care is the largest category and grew 39% over the period.
- It now represents about 28% of all pool-related searches, up from 25% in 2022.
- Homeowners are actively looking for help keeping pools clean, balanced, and swimmable, which aligns with strong demand for recurring service routes.

Repairs and leak detection are surging

- Repair, leak detection, and resurfacing searches more than doubled from 2022 to 2025.
- The biggest jump happens between 2024 and 2025, with a ~69% year-over-year increase.
- Share of overall searches rises from 8% in 2022 to 14% in 2025, indicating more aging pools, deferred maintenance catching up, and high-urgency work that is highly valuable for service businesses.

Construction demand is healthy, with some volatility

- Construction, installation, and builders searches are up 16% from 2022.
- Interest softened slightly in 2023, then spiked in 2024 and eased again in 2025.
- This pattern suggests an ongoing appetite for new builds and major projects, influenced by macro factors like housing activity and financing costs.

Homeowners are prioritizing function over aesthetics

- Designs, styles, and aesthetics searches are down about 20% from 2022 to 2025.

- Search interest is shifting toward “keep it working” topics (cleaning, repairs, equipment) over cosmetic upgrades.

Robots and automation are now a steady, mainstream interest

- Robots and automatic cleaners are expected to grow by ~10% from 2022 to 2025.
- Searches climb through 2024, then level off slightly in 2025.
- This looks like a mature, mainstream product category: sustained interest, driven by replacement and optimization rather than an early-stage boom.

Stable demand for equipment, services, and retail

- Miscellaneous equipment, services, and retail searches are up ~4% overall, with a noticeable bump in 2024.
- The category consistently accounts for 18–21% of total searches, indicating a stable base of ongoing spend on pumps, heaters, filters, chemicals, and related services.

The key takeaways

- Online interest in pools remains strong and is growing from a high baseline.
- The search mix is leaning more toward essential care, problem-solving, and repair work than toward discretionary design projects.
- That pattern favors service companies that emphasize reliability, fast response to repairs and leaks, and professional-grade maintenance programs, ideally supported by modern software and automation.

CHAPTER 1

Despite tight margins, tough hiring, and higher expectations, optimism gains ground

Moving into 2026, the biggest force shaping day-to-day operations is the same one that topped last year’s list: the broader economy. Owners once again point to inflation, interest rates, and consumer spending as the single biggest swing factor for performance. Talent and rising costs follow close behind, forming a familiar trio of pressures that shape how pros plan their routes, hire techs, and price their service.

Regulations remain a localized issue—important to smaller operators with tighter margins, but not making a significant impact on the market as a whole. About one in four respondents says drought rules, chemical-handling policies, or other local requirements affect their operations at least somewhat. Most don’t feel a direct impact today, but the pockets where these rules matter can create friction.

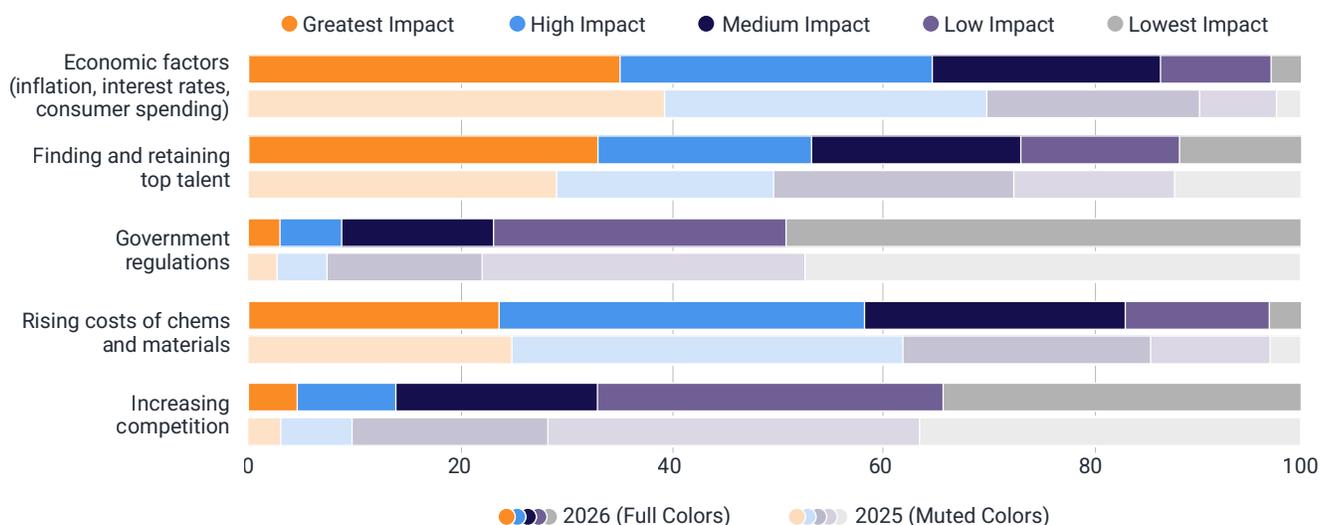
Tariffs are another variable on the radar. Most respondents expect some form of cost increase over the next 12 months, though many believe the impact will be manageable. Nearly one in five say they’re unsure, which leaves room for volatility, especially in parts and repair categories.

What the data reveals about 2026’s biggest challenges

When owners rank the challenges they expect to matter most in 2026, the scoreboard stacks up like this:

- Economic conditions take the top slot again, with nearly 40% calling this the #1 factor.
- Finding and retaining good techs climbs to second, overtaking rising costs compared to last year’s ranking.
- Government regulations round out the list with the lowest share of “#1 impact” votes.
- Rising chemical and material costs sit close behind, reflecting ongoing margin pressure.
- Competition ranks below the big three, with few seeing it as the top threat.

Which factors will have the greatest impact on your business?



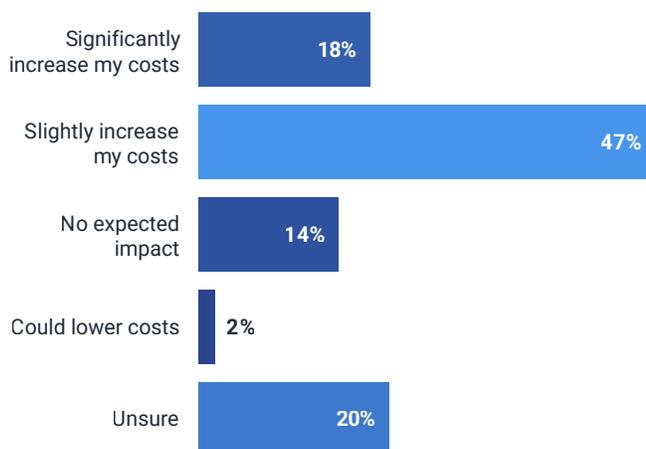
The bigger takeaway: the same forces that shaped 2025 are still in play, but talent availability is becoming a more urgent stress point. Pros feel the pressure to build strong teams to maintain route density, protect consistency, and capture higher-margin repair work.

Tariffs provide a mild headwind and much uncertainty

According to this year's survey, many pros are still gauging the impact of tariffs on equipment, supplies, and parts costs. Facing a possible 12-month window of shifting material and equipment costs, owners split into several camps:

- **18%** expect a *significant* increase in costs
- **47%** expect *slight* cost increases
- **14%** expect *no impact*
- **2%** expect possible *cost relief*
- **20%** are *unsure*

How do you expect tariffs to affect your business over the next 12 months?



SIDEBAR

Breaking down the top risks for 2026

- 1. Macroeconomic conditions**
 Everything from interest rates to consumer spending continues to affect pool ownership behavior. Owners consistently rank this as the top driver of their year.
- 2. Labor availability and retention**
 Hiring and keeping techs climbs in importance. The number of respondents calling talent their biggest operational constraint rose compared to the 2025 actuals. This shift reinforces how critical technician continuity has become for quality control and upsell capacity.
- 3. Input costs—chemicals, materials, parts**
 These pressures remain elevated. Paired with tariff expectations trending toward cost increases, owners see the need for tighter cost-to-serve visibility and smarter material use.
- 4. Local regulation**
 Not everyone feels it, but in affected markets, drought rules, environmental standards, and chemical-handling updates can shape service frequency, routing, and equipment recommendations.
- 5. Competitive intensity**
 Competition rises, but doesn't top the list. Professionalized service models, digital communication, and consistent technician assignments give well-run companies strong differentiation.

The center of gravity sits in the “slight cost increase” category. Pool and spa business owners aren’t panicking, but they aren’t ignoring the issue either. The nearly 20% who are unsure reflects an information gap and reinforces the need for tight vendor relationships, updated price lists, and early communication with distributors.

Even a modest tariff impact can accumulate across a route if margins aren’t protected. With most owners expecting some degree of cost increase, 2026 is a year to:

- Revisit parts and equipment pricing
- Maintain updated vendor agreements
- Review chemical billing strategies

Higher pool owner expectations are shaping operations

Customers increasingly expect proof of work and professionalism. Heading into 2026, pool service owners anticipate:

- **63%** expect digital communication and photo/video reports

- **63%** expect consistent technician assignment
- **45%** expect eco-friendly options

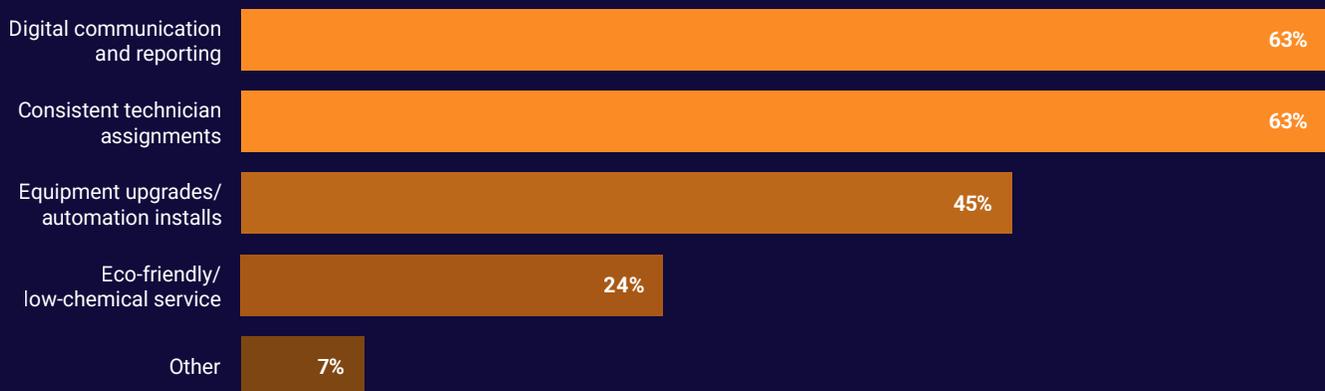
These expectations directly influence how teams are trained, how routes are planned, and which tools companies adopt to automate reporting and connect more smoothly with homeowners.

Businesses that invested in these areas last season often saw clearer trends in customer satisfaction. That payoff boosts their confidence for the year ahead. They know that operational discipline leads to fewer surprises, fewer cancellations, and a stronger ability to raise rates when needed.

What this means for operators:

Investments that improve communication, documentation, and technician consistency support retention, pricing power, and brand credibility. Eco-efficient equipment and solutions also have growing sales potential.

What do you believe customers will expect more of by 2026?

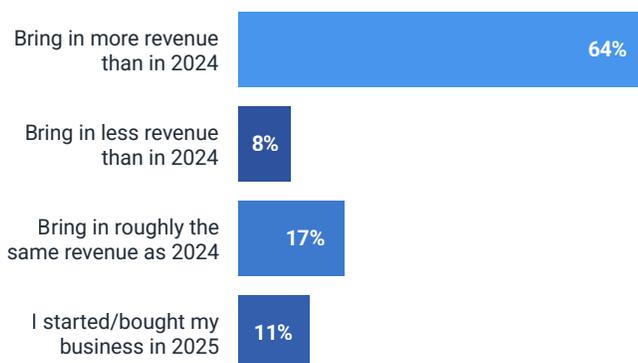


Despite challenges, optimism gains ground in this year's revenue outlook

Revenue expectations among pool service businesses show a meaningful shift this year. In last year's survey, 58% of owners anticipated higher revenue than the prior year, 21% expected to stay flat, and 9% expected to decline. This year, optimism strengthened: 64% expect to bring in more than last year, 17% expect similar results, and 8% foresee a decrease.

The change isn't dramatic, but it reveals a steady move away from caution and toward growth-minded planning. With fewer owners predicting "about the same" performance, more are committing to concrete efforts to grow revenue. Several market forces and industry dynamics help explain why confidence is rising.

With 2025 nearly over, are you forecasting to:



The installed base of pools continues to rise

The number of residential pools in the U.S. continues to grow. Even in regions where new construction has cooled from its peak, the installed base remains large and continues to expand. More pools in the market mean more opportunities for route-building, recurring service plans, and higher long-term revenue potential.

This growing base supports stable demand for weekly service, equipment maintenance, and chemical usage. As service routes expand and densify, operators can increase revenue without necessarily adding disproportionate labor or overhead.

Pool service owners are getting smarter about pricing and operations

The past few years pressured pool businesses to rethink how they run and price their services. Many owners responded with more strategic approaches to revenue:

- Updating long-outdated service rates
- Moving toward clearer, more predictable chemical and parts pricing
- Packaging service tiers in ways that are easier to communicate
- Improving operational efficiency through software and systems

These changes help shift revenue growth from "more customers" to "better revenue per stop." That's a key point. The optimism in this year's survey doesn't necessarily point to a wave of new pools or dramatic jumps in customer volume. It reflects a growing group of owners who see opportunities to strengthen margins, correct underpricing, and drive more value from their existing customer base.

“These changes help shift revenue growth from “more customers” to “better revenue per stop.”

Technology as a driver of confidence

Technology adoption is becoming a foundational element of the most confident businesses. Owners who use modern scheduling, billing, routing, and reporting tools gain better visibility into their financials and day-to-day performance. They're able to:

- Identify profitable and unprofitable accounts
- Reduce missed charges and billing delays
- Communicate more clearly with customers
- Tighten routes and reduce wasted time
- Create more predictable, dependable cash flow

These efficiencies compound. Owners who improve consistency and reduce operational friction often experience a meaningful revenue lift without significantly changing their customer count. That improvement helps explain why a larger share of pool company owners now project year-over-year revenue growth.

A realistic, balanced outlook

While optimism has grown, it's not boundless. Macroeconomic conditions still carry risk. Labor remains tight in many markets. Equipment prices, while more stable, remain higher than pre-pandemic levels. Consumer confidence can shift in response to broader economic pressures.

Yet even with these factors in play, most pool service owners expect to grow. The reasons are grounded: stable recurring demand, an expanding installed base, operational upgrades, clearer pricing strategies, and more widespread adoption of business tools that tighten operations and support revenue discipline.

“Yet even with these factors in play, most pool service owners expect to grow.”

Key insights for pool pros

This shift in revenue expectations offers several important takeaways:

Growth requires intentional planning

The businesses projecting growth aren't counting on luck. They're making specific decisions around route density, service tiers, pricing, hiring & retention, and customer experience.

Revenue quality matters more than volume

Improving pricing consistency, service packaging, and operational efficiency often drives more growth than simply adding accounts.

Modern tools are becoming essential infrastructure

The most confident operators are those who use software to tighten routes, prevent lost revenue, and communicate reliably with customers.

Consistency builds customer trust—and revenue stability

A business that delivers high-quality, reliable service earns the right to raise prices and retain customers in the long term.

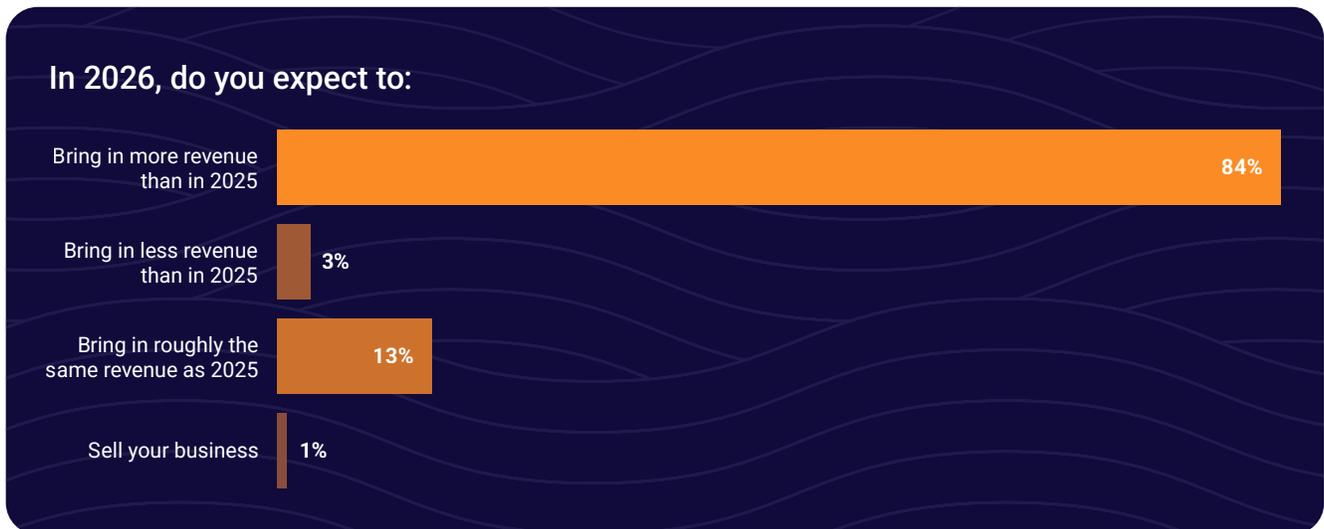
CHAPTER 2

Growth paths, pricing moves, and what's fueling confidence



A year starting with confidence

Heading into 2026, pool service companies report strong confidence in their trajectory. Nearly 84% of respondents expect to generate more revenue than they did in 2025, another 13% expect to hold steady, and only a very small share anticipates a decline. Less than 1% plan to sell, reinforcing a stable, growth-oriented outlook.



This optimism stems from what operators see every week: dependable customer retention, continued demand for service routes, and enough cost stability to budget and invest with a clear head. The market isn't booming wildly, but it's predictable in the ways that matter.

Growth strategies for 2026: A broader playbook emerges

For many years, raising prices was the most consistent lever for maintaining healthy margins and funding expansion. Pricing remains important, yet the 2026 data shows owners are thinking more holistically about growth.

Across both 2025 and 2026 surveys, several themes stand out:

- Expanding into more revenue streams continues to be a major strategy
- Operational efficiency remains the top priority year over year
- Marketing investment is rising steadily
- Route buying and selling remain niche, but stable
- Reducing customer count to increase per-pool profitability holds steady for a quarter of operators

“The market isn't booming wildly, but it's **predictable** in the ways that matter.”

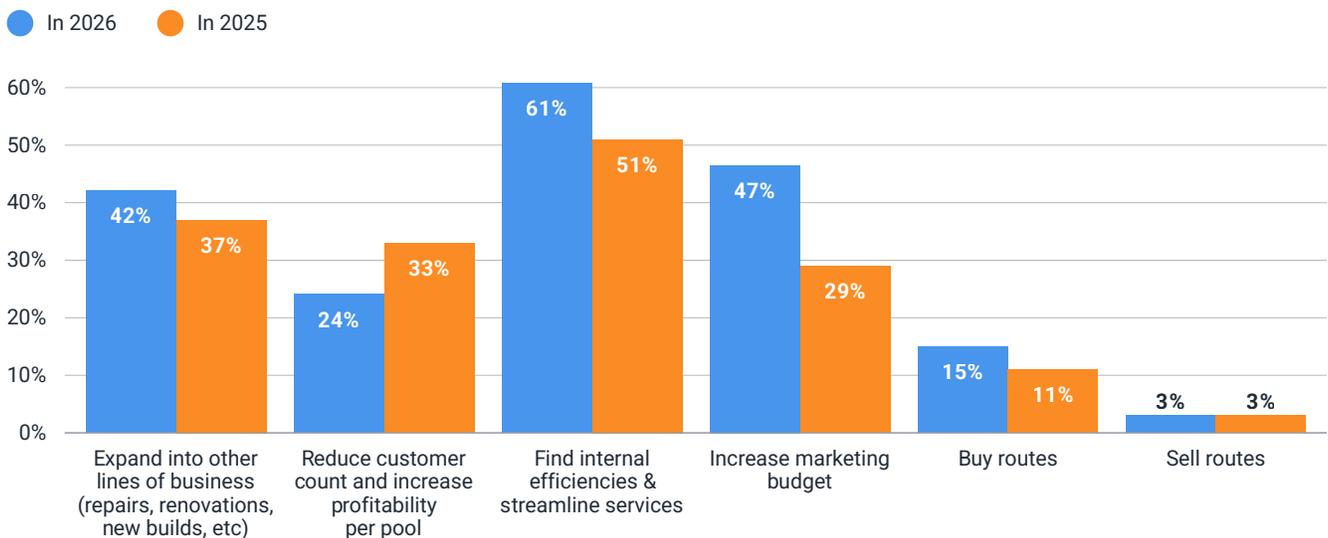
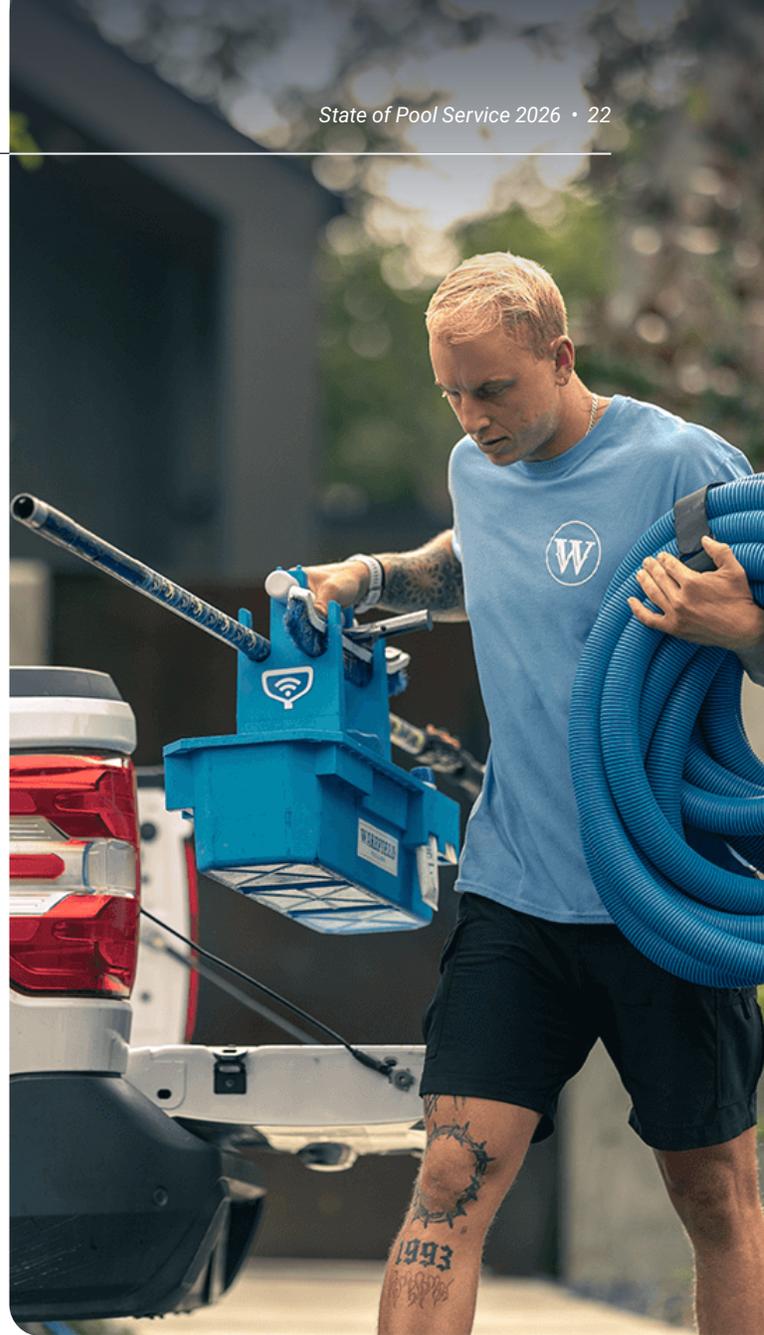
Taken together, the data show that pool pros aren't relying on any single move. They're blending operational discipline, strategic expansion, pricing structure, and marketing investment to shape the next year.

What pool pros plan for 2026

- 61% will find internal efficiencies and streamline services
- 47% will increase marketing spend
- 42% will expand into repairs, renovations, builds, or other service lines
- 24% will reduce customer count and increase profitability per pool
- 15% will buy routes
- 3% will sell routes

These ratios mirror 2025 almost exactly, which speaks to a sector with a clear and consistent sense of what works.

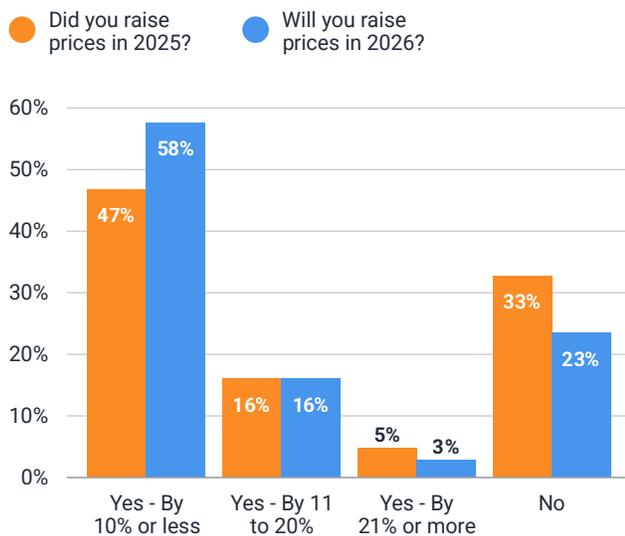
What strategies will you use to achieve your goals?



Where pricing fits into the growth mix

Pricing remains a critical part of the puzzle, even if it's not the only lever operators are focused on.

Price increases in 2025 vs 2026



The pattern year-over-year is nearly identical. Operators know their cost structure, they understand customer expectations, and they avoid reactive changes.

Why some businesses won't raise prices in 2026

About a quarter of companies plan to hold rates flat. Their reasons vary:

- Their current pricing aligns well with local norms
- They already made significant adjustments in 2024 or 2025
- They operate in markets with price-sensitive customers
- They're prioritizing growth in routes, staff, or brand presence
- They lack full visibility into cost-to-serve and don't want to move without data

Flat pricing isn't inherently risky, but it works best when paired with strong financial awareness.

Where the risks emerge: The silent erosion factors

Holding rates flat without monitoring key inputs can create problematic blind spots:

- **Margins thin out quietly**
Chemical costs, labor, insurance, and fuel continue to rise. Even small increases eat away at per-pool profitability.
- **Chemical-heavy pools become liabilities**
If chemicals are included, high-consumption pools can quickly slip underwater financially.
- **Technician retention becomes harder**
Competitive wages are rising. Without incremental price steps, companies struggle to keep pace with the market.
- **Future pricing flexibility disappears**
Skipping small annual increases can make a larger future adjustment more painful for customers.
- **Reinvestment slows down**
Digital reporting, in-app communication, routing optimization, modern equipment, and training all hinge on healthy margins.

“Pricing remains a **critical part** of the puzzle.”

A balanced path: Matching pricing with broader strategy

For operators choosing to hold price steady, the key is staying sharp elsewhere:

- Monitor cost-to-serve at the pool level
- Track outlier chemical usage
- Protect technician time and workload
- Revisit margin structure annually

Meanwhile, for owners who plan a modest increase—particularly those $\leq 10\%$ —these adjustments help preserve service quality and fund the operational investments that customers now expect.

Connecting the dots: The full story behind the numbers

Looking across two years of survey data, several themes form a clear narrative:

- 1. Outlook is strengthening**
Revenue expectations continue to rise (81.25% \rightarrow 83.54%), and this confidence is grounded in actual performance.
- 2. Growth strategies are expanding**
Owners are leaning on a combination of efficiency, diversified services, and stronger marketing, not only pricing adjustments.
- 3. Pricing remains steady and disciplined**
Plans track in near-perfect alignment year-over-year. High-percentage price jumps remain rare.
- 4. Top-line growth stays central**
About half of owners each year prioritize revenue growth over pure profitability. Their strategy mixes measured pricing, operational discipline, and selective expansion

SIDEBAR

Rate-setting playbook

Quantify cost movement

Track changes in chemicals, parts, labor, and fuel compared to last season, then convert that into a per-pool monthly impact. Identify pools with unusual chemical consumption so communication can be tailored.

Set the increase

Choose the smallest pricing step that protects margin while accounting for volatility. Most firms land in the $\leq 10\%$ range. Pair increases with clear explanations of what's included—visit frequency, chemical handling, and response expectations.

Timing & cadence

Announce updates ahead of the busy season with a clear start date. Offer optional upgrades or service tiers when appropriate.

Documentation

Update agreements and include a chemical or materials note in each invoice memo during the first few months after the change.

Guardrails

Stick to route density and technician time standards. Pricing should strengthen efficiency, not erode it.

SIDEBAR

Customer-ready communication templates

Template 1 – Standard annual adjustment

New Message

Update to your monthly service rate

Each season, we review our rates to maintain reliable service and timely responses. Beginning [DATE], your new monthly service rate will be \$[NEW AMOUNT]. This reflects changes in materials, transportation, and technician wages this year. Your service scope and reporting stay the same. If you'd like to discuss upgrade options—such as chemical inclusions or equipment efficiency—reply anytime. We appreciate your continued trust.

[SEND](#)

Template 2 – Chemical pass-through update

New Message

Chemicals and your monthly bill

Chemical costs have shifted this season. To keep billing predictable, we're updating your plan to [include chems / bill separately / hybrid] starting [DATE]. Your new monthly total will be \$[NEW AMOUNT], based on your pool's usage history. All visit photos, readings, and chemical applications will continue to be documented so you can see what was used and why.

[SEND](#)

CHAPTER 3

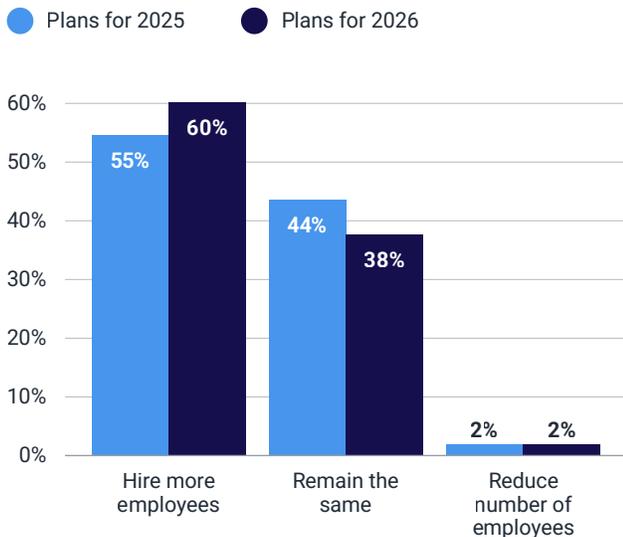
Labor, teams, and how pool companies will staff for 2026

Building teams for a stronger year

Pool service companies are heading into 2026 with expansion on their minds, but they're doing it with discipline, not excess. Six in ten businesses plan to add employees this year, while another 38% expect to hold their team size steady. Only 2% anticipate reducing headcount.

Compared to last year's plan, that's a notable rise in growth intent: those planning to hire increased, and the share planning to hold flat decreased accordingly. The outlook is positive but cautious, with owners expecting a strong year and building teams to match, without straining the organization.

Plans for 2025 vs 2026



The market is dominated by lean teams with early signs of scale

The typical pool company still runs lean, both in the office and in the field. More than half of businesses operate with 0–1 full-time office staff, and another 32% run with 2–6 people managing back-office functions like scheduling, dispatch, customer communication, and billing.

The category remains dominated by compact teams in which owners, office managers, and a small set of techs wear many hats.

But the year-over-year data shows a subtle shift toward larger organizations. The share of companies with 0–1 office staff slipped from 62% to 57%, while mid-size and larger office groups ticked upward. Field crews show a similar nudge: the percentage of companies with seven or more techs increased from 18% to 21%.

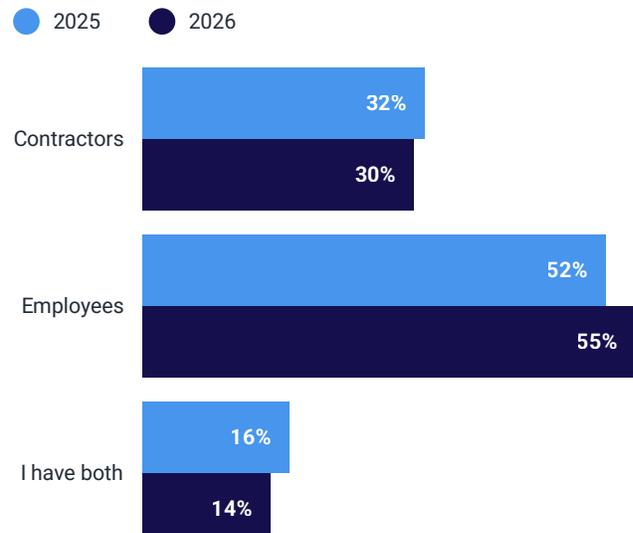
These aren't huge jumps, but they signal a slow, steady maturity curve. As businesses expand and expectations around digital reporting, communication, and consistency grow, companies are adding the structure and people needed to support a more professional operation.

For owners sitting in the transition phase—moving from a two-tech operation to a five+ tech team—this shift brings new operational realities. It becomes harder to run everything from a cell phone and mental notes. Companies at this stage need lightweight customer success processes, clearer inventory workflows, and regular QA checks on service reports. The data shows that many operators are already making those moves.

W-2 employment edges up as companies standardize

Another sign of the industry's slow-and-steady professionalization is the employment model. The majority of companies rely on W-2 employees, and that share continues to climb. In 2026, 55% say W-2 techs form the backbone of their workforce, up from 52% last year. Contractor use dipped slightly to 30%, and mixed models fell as well.

Are your techs contractors or employees?

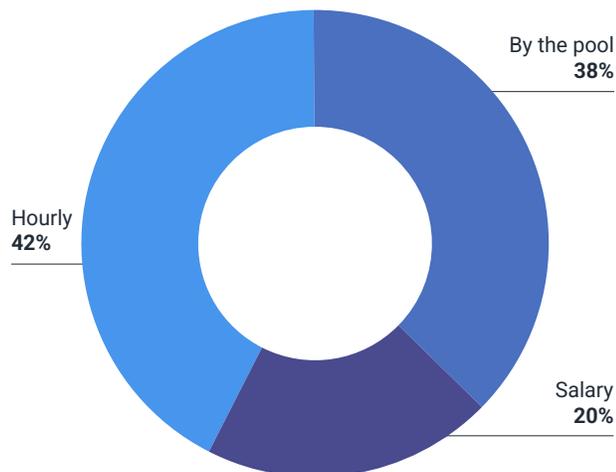


This shift matters. W-2 structures give owners tighter control over training, scheduling, safety, and brand standards, all of which tie directly to consistency and customer experience. For companies still using contractors, the message isn't that the model is flawed; it's that standard procedures and expectations need to be crystal clear to avoid widely variable service from week to week.

How techs are paid: Stable, familiar structures

Pay methods remain remarkably stable year over year. Hourly pay remains the most common approach at 42%, followed closely by per-pool pay at 38%, with salaried techs rounding out the mix at 20%. The slight increase in hourly pay aligns with the ongoing drift toward W-2 employment and the desire for more uniform service standards. Meanwhile, per-pool remains popular with operators who tie compensation to performance and route quality, especially when paired with callbacks, water balance, or photo-reporting metrics.

How do you pay techs?



For businesses that use mixed compensation models, the key is consistency. Techs should understand exactly how performance is measured and rewarded. Even simple scorecards (tracking on-time arrival, balanced chemistry, and zero-callback weeks) help reinforce standards without encouraging rushed visits.

Peak-season staffing: Selective contracting, not widespread

Seasonal swings remain part of the business, but most companies still prefer to ride those waves with their core team. Only 26% report using contract labor during peak months. The other three-quarters handle the busy season through overtime, shifted routes, adjusted visit schedules, or pre-planned workload smoothing.

For companies in tight labor markets or tourist-driven regions, seasonal contractors can be a lifeline, but they require preparation. Clear procedures, pre-season training, well-defined checklists, and tight QA processes help temporary staff fit into your standard of service.



What all this means for 2026

Taken together, the workforce data shows an industry that's growing steadily and professionally, not chaotically. Businesses are adding staff, but they're doing it with guardrails:

- They're building office teams that can support a growing number of clients.
- They're leaning more heavily on W-2 employment to create consistency.
- They're keeping pay structures simple and fair.
- And they're using seasonal labor only when necessary.

Underneath all of this is the pressure every owner feels: hiring qualified techs is getting harder. With 62% of companies naming it their top challenge, investments in recruiting, onboarding, and technician training are no longer optional. They determine whether growth turns into efficiency, profitability, and customer loyalty or into churn, callbacks, and burnout.

As you move forward into 2026, think about where your team sits on this maturity curve. Are you building the structure needed for the next phase of growth? Are you giving your techs the tools and support they need to work consistently? And most important: do you have the systems in place to attract and keep the right people?

Those questions are the difference between hiring more and growing well.

A woman with blonde hair, wearing sunglasses, a blue short-sleeved shirt, and a white skirt, is using a pool vacuum. She is standing in a garden area with various plants and trees in the background. The scene is brightly lit, suggesting a sunny day. In the bottom right corner of the image, there are several orange wavy lines.

“As you move **forward into 2026**, think about where your team sits on this maturity curve.”

CHAPTER 4

Pool service marketing in 2026 is lean, local, and performance-driven

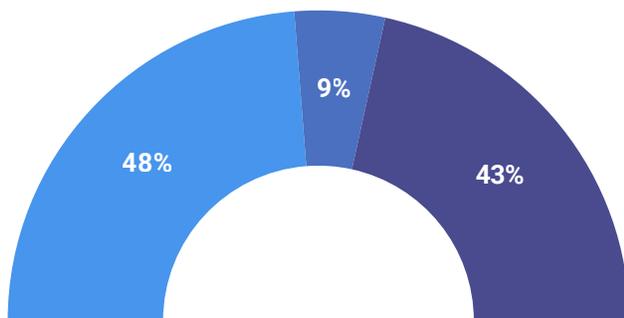
Marketing in the pool service world keeps getting more intentional. Budgets aren't exploding, but they're steady, disciplined, and increasingly tied to channels that show real results. Owners are becoming more comfortable with digital tools, more willing to test new approaches, and more aware of what actually drives high-quality leads. The picture that emerges from the 2026 data is simple: pool companies are still investing in marketing, but they're keeping it lean, local, and performance-driven.

Budgets: Steady, thoughtful, and trending slightly upward

When owners look ahead to 2026, nearly half intend to increase their marketing spend (48%). Another 43% expect to hold budgets steady, and only 9% plan to cut back. The numbers barely move from last year's posture, which showed roughly 50% expecting to spend more and about 42% planning to stay the same.

In 2026, do you plan to:

- Spend more on marketing
- Spend less on marketing
- Spend the same on marketing



This stability signals confidence rather than exuberance. Owners are willing to invest in demand generation but are closely monitoring their numbers. The mentality is: keep experimenting, keep learning, but don't overspend on a customer.

Who's marketing and how much they're spending

Not every pool company uses paid marketing. In fact, only 42% of respondents report running paid campaigns. Those who do tend to operate on modest budgets, reflecting the industry's local nature.

Among active spenders, nearly two-thirds fall into low-budget tiers:

- \$0–\$5k annually: **39%**
- \$5–10k: **24%**

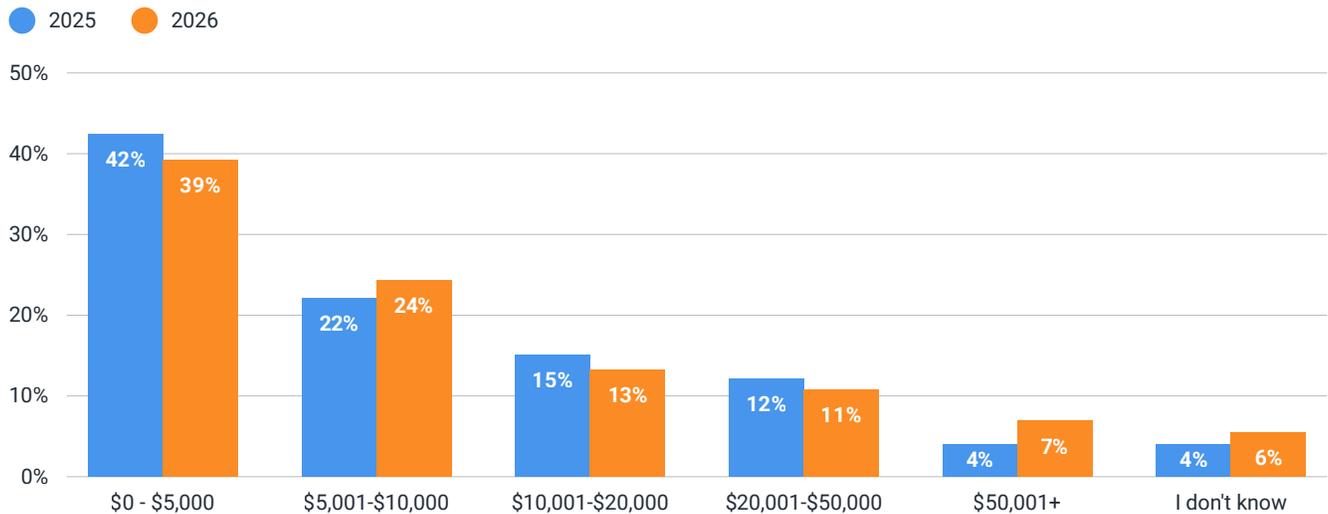
From there, the curve tapers:

- \$10–20k: **13%**
- \$20–50k: **11%**
- \$50k+: **7%**

This is a market driven by targeted ads, small experiments, and owner-managed brand building. Most pool pros aren't throwing money at broad awareness campaigns; they're looking for measurable wins close to home.

The year-over-year movement is subtle but telling. The bottom bucket (\$0–5k) shrinks slightly, while the \$5–10k and \$50k+ ranges tick upward. This suggests that as companies mature, they widen the gap between small spenders and those building more sophisticated marketing engines.

What is your annual marketing budget?



How companies resource their marketing work

Most pool companies still keep marketing in-house, but that dominance is starting to soften.

- 50% handle marketing internally
- 30% use a hybrid model
- 20% outsource fully to an agency

Compared to last year, the shift is clear: in-house work is dropping (from 57% last year) while agency and hybrid use rises. This is a natural progression for businesses adopting more digital advertising, creative assets, and analytics—tasks that can stretch a small team’s bandwidth.

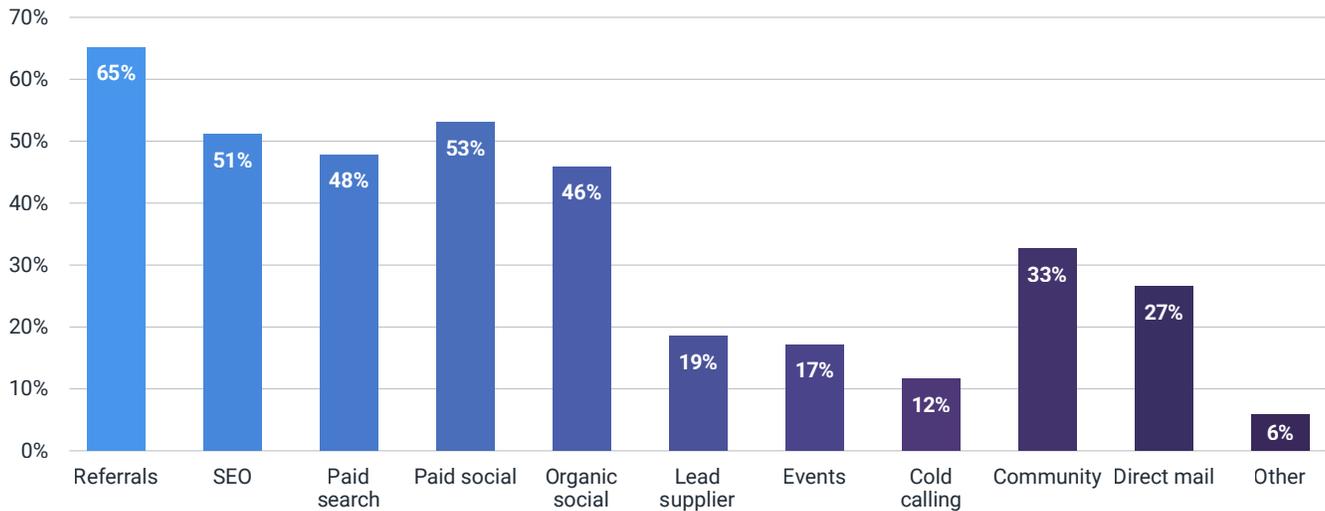
For many owners, hybrid models are becoming the sweet spot: keep the customer relationship and local voice in-house, outsource the technical complexities of search ads, paid social, or creative production.

“Pool companies are still investing in marketing, but they’re keeping it lean, local, and performance-driven.”

Which channels pool pros actually use

Referrals still sit at the heart of pool service marketing, and they likely always will. Ultimately, pool service is a local market, and referrals consistently deliver the best leads because they’re rooted in the trust owners work so hard to build. In 2026, 65% of companies list referrals as a core channel.

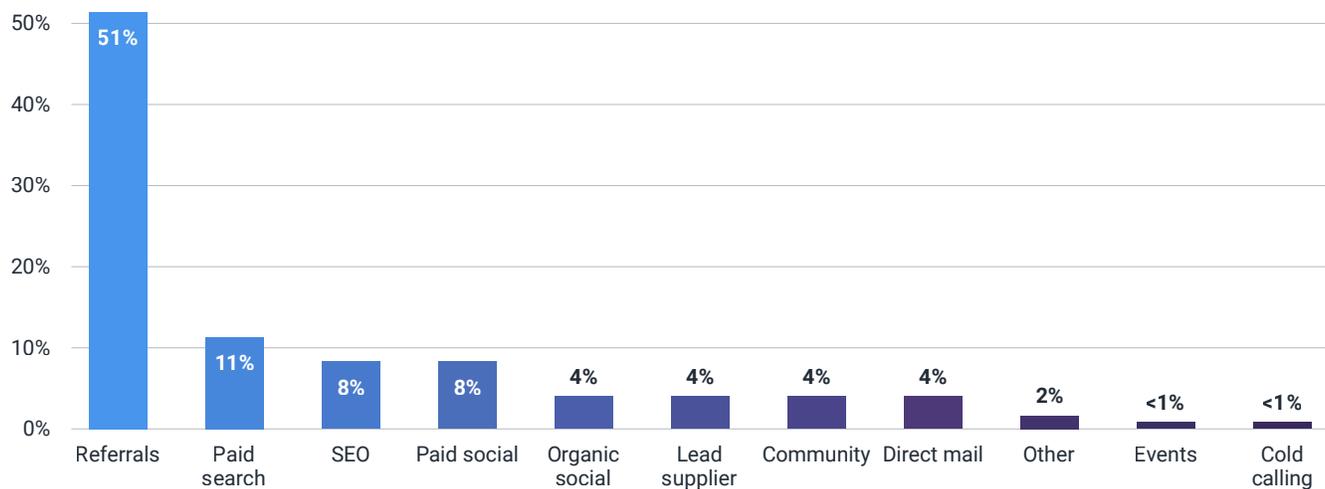
What marketing channels do you currently invest in?



The standout shift compared to last year is SEO. Adoption jumped by nearly 7 percentage points, reflecting stronger website investments, better local search strategy, and the rising importance of showing up when homeowners Google “pool service near me.” Referrals dipped slightly, but they remain dramatically ahead of every other category.

Where high-quality leads really come from

When owners are forced to pick just one source of the best, highest-quality leads, the ranking is clear:

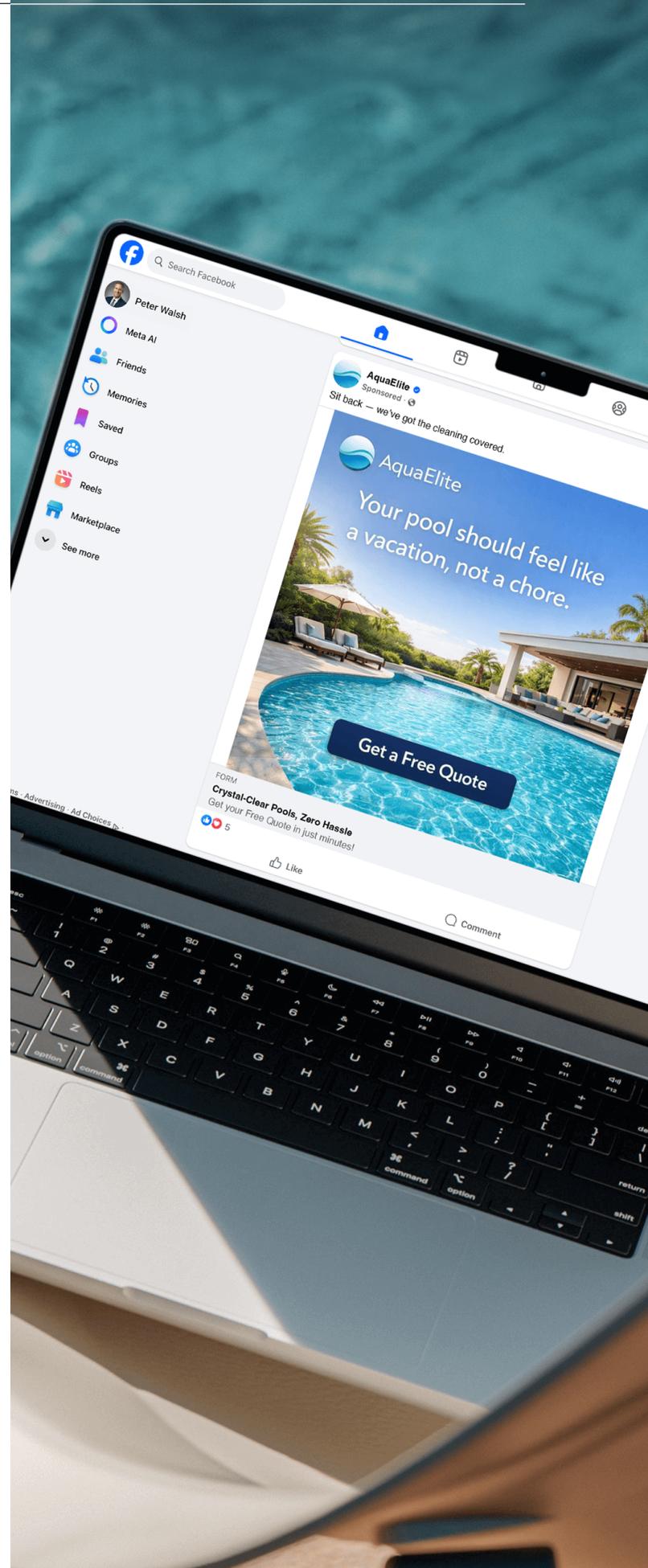


This echoes last year’s findings: referrals dominate, and channels like paid search and SEO sit just behind them. Paid social plays a role, but more as a visibility and remarketing tool than a primary driver of sales.

For companies planning their budgets, this hierarchy matters. If a tactic doesn’t support referrals, search intent, or credibility building, its role in the mix should probably be limited.

What this means for your 2026 marketing plan

- 1. Keep referrals systematized, not passive.**
Referral requests, review prompts, simple reward mechanics, and consistent follow-up can turn your strongest channel into a predictable engine. Most businesses leave referral potential on the table.
- 2. Use SEO and paid search to capture intent when it's hottest.**
These channels deliver the highest-quality non-referral leads. Even small budgets can go far when paired with smart targeting, location filters, and tight keyword groups.
- 3. Treat paid social as a visibility and remarketing tool.**
It builds familiarity, supports brand presence, and warms up cold audiences. It's rarely the "best lead generator," but it supports everything else.
- 4. Keep budgets tight until you prove ROI.**
Given the industry's modest spend ranges, focus on small experiments with clear goals.
- 5. If you outsource, outsource strategically.**
As more companies move toward hybrid or agency models, the best partnerships blend local voice (you) with technical expertise (them). Avoid "set-and-forget" packages and prioritize transparency.
- 6. Be cautious with lead suppliers.**
Adoption is rising but still modest. These channels should come with guardrails: geographic exclusivity, tight budgets, rapid-response processes, and clear disqualification rules.



SIDEBAR

What a \$5k marketing budget should actually do for you

Most pool companies spend between \$0 and \$10k a year on marketing, and even small budgets can make a real impact when they're structured well. Here's how to plan a typical \$5,000 annual marketing budget for maximum return.

1. Build a strong foundation first

Budget: \$500–\$1,000

- Clean up your Google Business Profile
- Add fresh before/after photos monthly
- Improve website basics (services, locations, contact form)
- Ask for and respond to Google reviews

This is the highest-ROI work in the entire budget.

2. Strengthen local visibility

Budget: \$500–\$1,000

- Local directory listings
- Community sponsorships
- HOA newsletters
- Targeted neighborhood mailers

These tactics keep your name circulating where your customers live.

3. Run simple paid social OR invest in search intent

Here's where you need to make a choice. Running small tests on both paid social and paid search should give you a directional idea of which performs better. Once you have some clarity on results, you can make a bigger investment.

Paid social

Testing budget: \$600–\$1,200

Paid social shines for awareness and remarketing—not for immediate conversions. Use it for:

- Route expansion announcements
- Seasonal openings/closings
- Before-and-after content
- Recruiting ads

Paid search

Testing budget: \$1,200–\$1,800

Spend lightly but consistently on Google Ads targeting:

- “pool cleaning near me”
- “pool service [your city]”
- “pool repair [your city]”

Once you start collecting some data, it's crucial to know your cost to acquire a customer, the value of each customer, and to track this performance very closely.

4. Keep a buffer for testing

Budget: \$300–\$500

Set aside a small test fund for new tactics like:

- Photo/video upgrades
- Boosting top-performing posts
- Trying lead forms on Facebook
- Running a promo during peak season

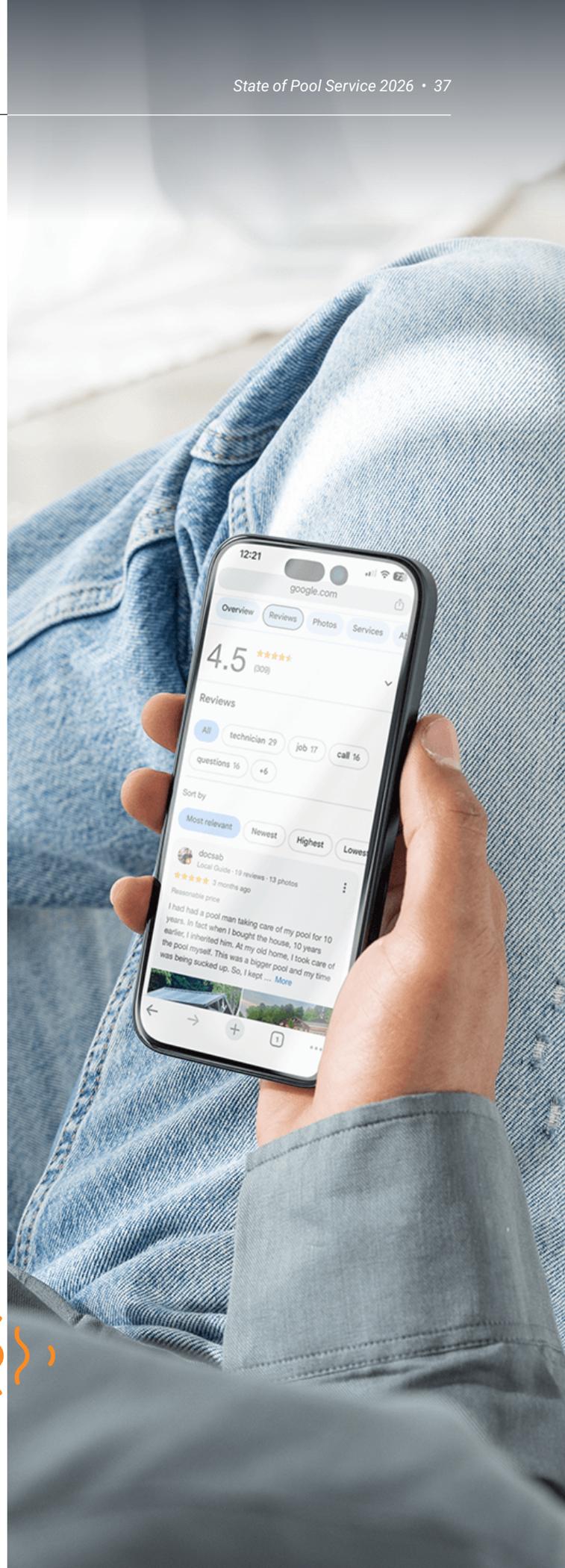
A \$5k budget won't dominate your market, but it can deliver good results if you focus on the right channels—search intent, local visibility, review generation, and referral structure.

Marketing in 2026: A clear, steady path forward

Pool service companies aren't trying to reinvent the wheel. They're doubling down on what works—referrals, search intent, SEO clean-up—while building confidence in digital tools and outside help. Budgets remain small but purposeful. Teams are learning, testing, and refining their marketing engines with each season.

The bottom line: marketing is no longer a “nice to have” for a growing pool business. It's becoming a routine part of running a professional operation, and the companies that treat it that way are widening the gap between themselves and their competitors.

“Marketing is no longer a “nice to have” for a growing pool business. It's becoming **a routine part** of running a professional operation.



CHAPTER 5

What technology runs modern pool service in 2026



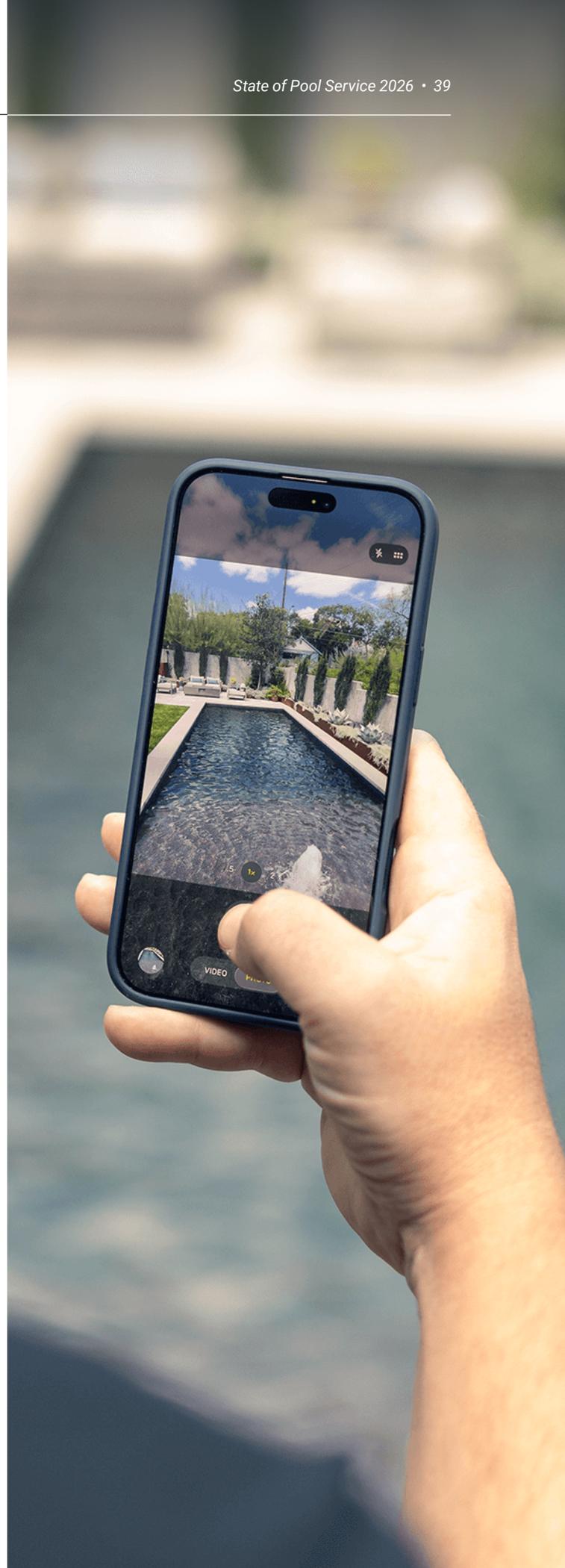
Software has quietly become one of the biggest differentiators in pool service. In 2026, the operational story is about how modern pool companies are building their stack: fewer disconnected tools, tighter workflows, and more emphasis on systems that cover the end-to-end job cycle—from scheduling and servicing to billing, payments, and reporting.

The backbone: one system for field work, one for the books

At the center of most modern setups is a simple principle: pair a field operations platform with an accounting system, then add specialized tools only when they create clear operational lift. This structure creates a steady loop. Routing, service documentation, customer communication, invoicing, payments, and bookkeeping work together without constant manual handoffs.

Most popular software by type, according to 2026 survey respondents:

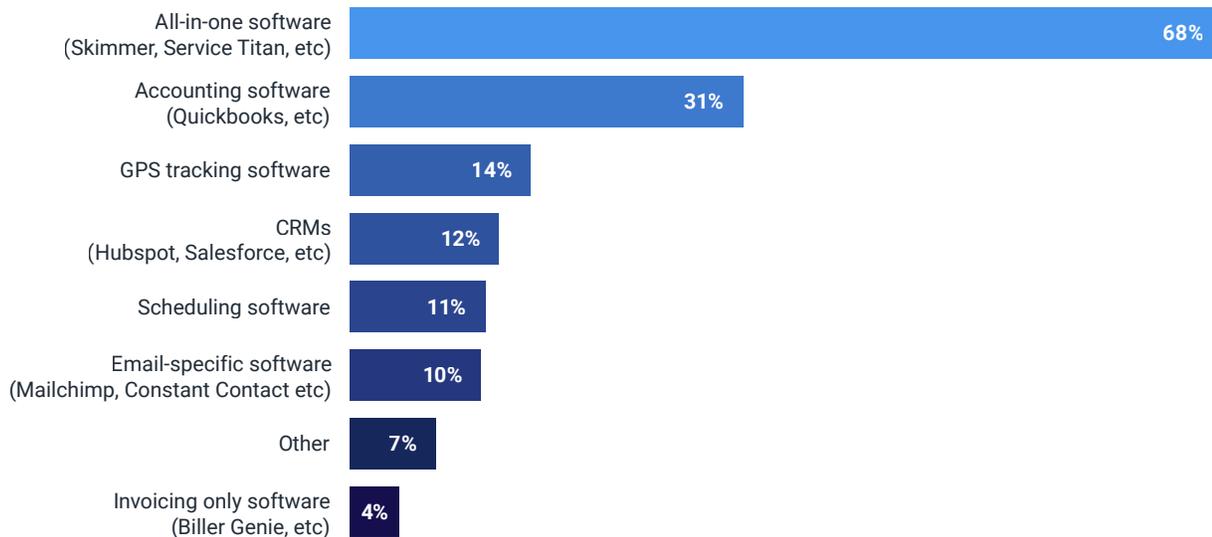
1. Accounting software (eg, QuickBooks)
2. All-in-one software (Skimmer, Service Titan, etc)
3. GPS tracking
4. Google Suite
5. Scheduling software
6. No software
7. Email-specific software (Mailchimp, Constant Contact, etc)
8. CRMs (eg, Hubspot, Salesforce, etc)
9. Invoicing only software (Biller Genie, etc)



What owners plan to buy next

The purchase funnel tells an even clearer story. Of the companies shopping for software in 2026, 68% plan to buy an all-in-one solution.

What kind of software do you plan to purchase?



This means the shift toward unified platforms isn't slowing; it's accelerating. The pipeline from last year confirms this. In 2025, 31% of owners planned to buy software, and nearly 69% of that group wanted an all-in-one platform. The momentum from that purchasing wave shows up directly in the 2026 installed base.

Where point tools still matter

Even in streamlined stacks, point solutions still play a role when they solve a specific problem better than an all-in-one system alone. Common examples include:

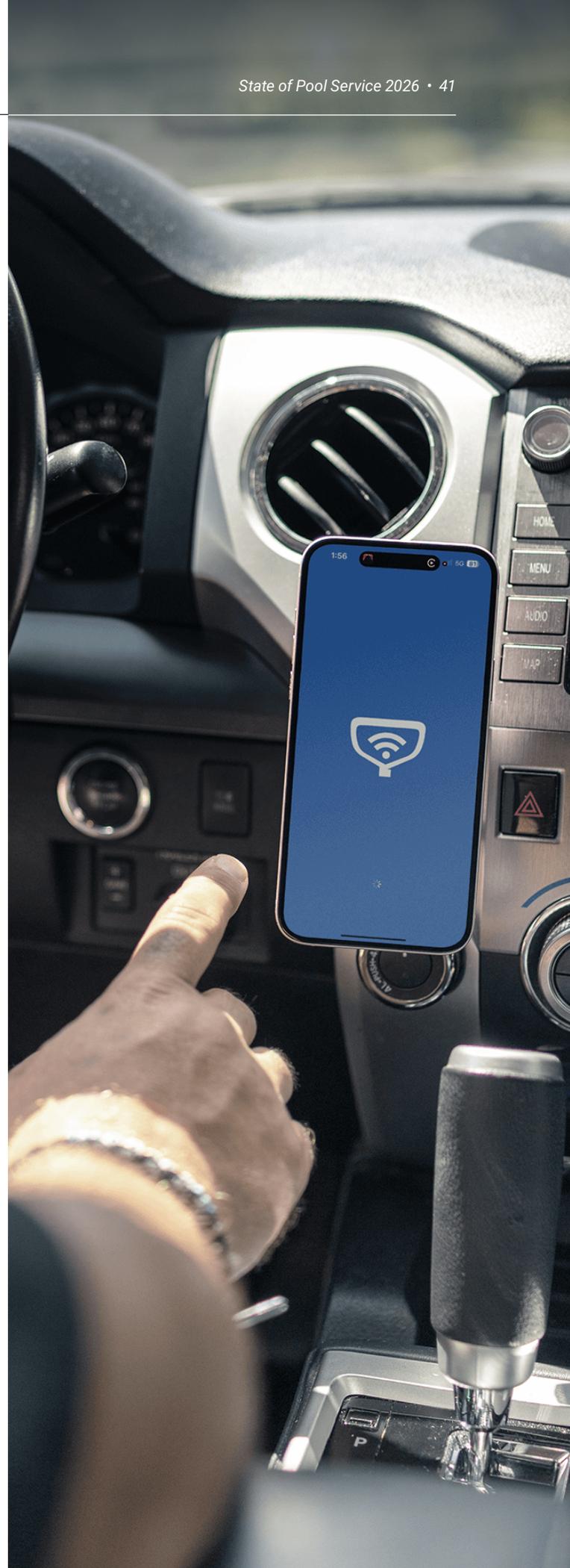
- Office utilities to keep documents, templates, and internal coordination organized
- GPS/route accountability tools to improve route discipline and verify technician movement
- Lightweight scheduling tools for teams that prioritize simplicity or are still evolving their workflows
- CRM and lifecycle communication tools when a company needs more control over follow-up, quoting, and repeatable outreach
- Invoicing-only tools in cases where billing is the primary operational gap being solved

The theme is intentionality: point tools earn their place when they reduce admin time, improve consistency, or protect margins.

- **Scheduling point tools:** These remain the most common among small teams that want lightweight routing or haven't fully transitioned to a suite.
- **GPS tracking:** This stands out as a meaningful complement, helping owners tighten route discipline and verify tech movement.
- **CRMs and email-specific tools:** These typically appear when companies want more control over follow-up, quoting, or drip campaigns.
- **Google-style office tools:** These continue to serve as universal "glue".

But none of these are the core. They enhance the workflow; they don't define it.

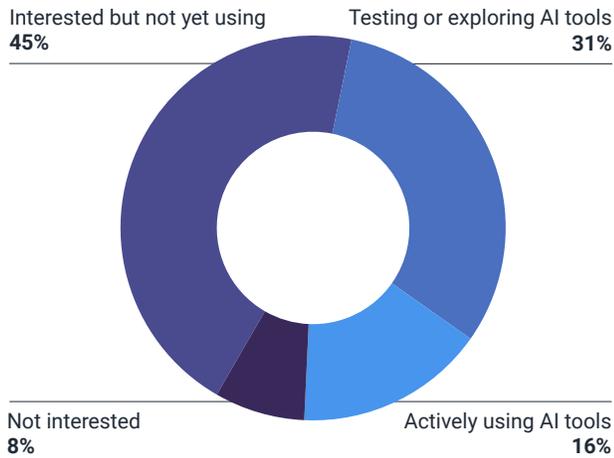
“In 2025, 31% of owners planned to buy software, and nearly 69% of that group wanted an **all-in-one platform.**”



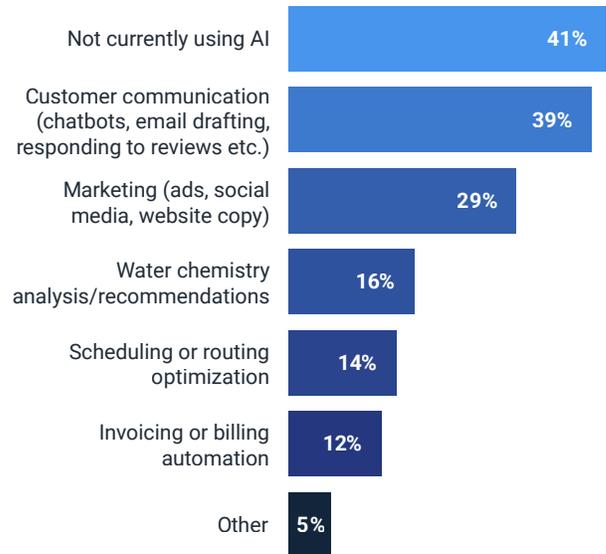
AI in the pool service sector: Early traction with practical limits

2026 is the first year we have structured data on how owners view AI, and the market’s attitude towards it is surprisingly pragmatic. Pool companies aren’t chasing hype, but they clearly see value where the technology removes repetitive work.

What describes your current stance on AI in your business?



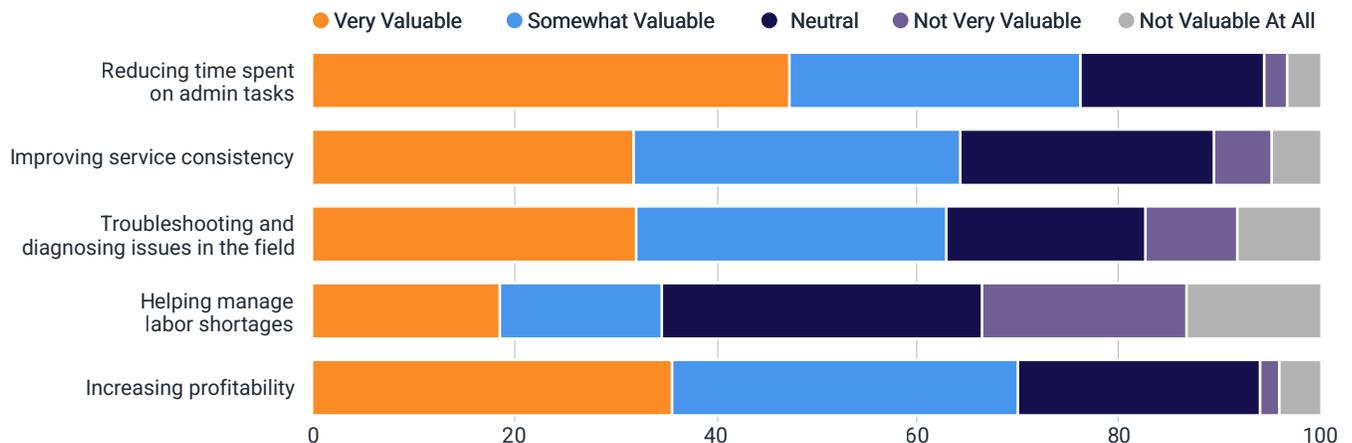
In what areas are you using AI today?



Where owners see the most value

- Reducing admin time: 47% rate this “very valuable”
- Improving profitability
- Supporting service consistency
- Assisting with troubleshooting
- Relieving labor shortages (lowest-rated)

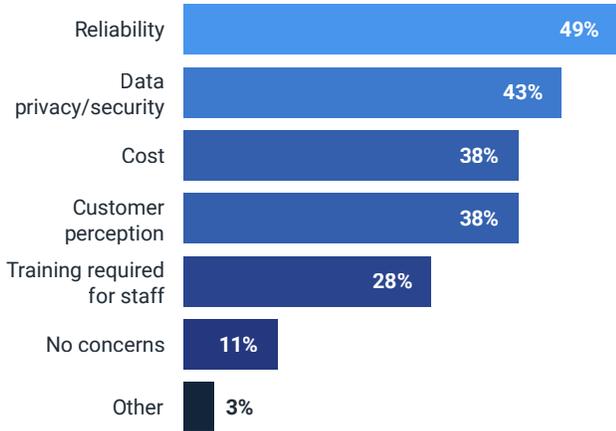
The top benefit—saving time—aligns squarely with the administrative load owners feel every day: invoicing, documenting service, managing schedules, and staying on top of customer communication.



What concerns business owners have about AI

When it comes to adopting AI into their businesses, owners’ concerns aren’t philosophical—they’re operational:

What concerns do you have about adopting AI in your business?



These are the same concerns owners have when evaluating any major tool: Will it work? Will it confuse customers? Will my team actually adopt it?

The investment horizon

Despite the cautions, the next 12-month outlook is positive:

- 21% are *very likely* to invest
- 17% are *likely*
- 21% are *somewhat likely*

That’s nearly 60% showing at least moderate intent to use AI-driven tools in the near future.

Where owners want AI to help vs. where they draw the line

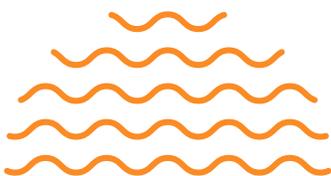
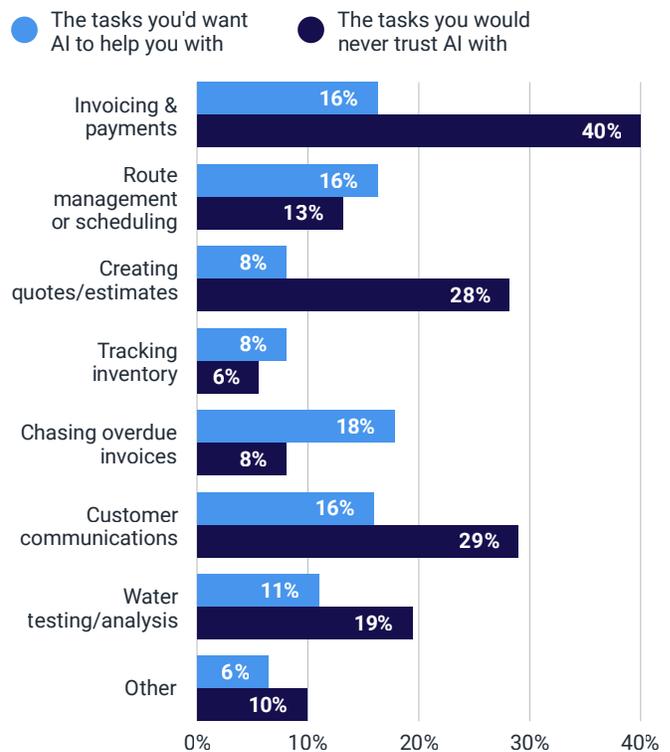
Owners most want help with:

- Invoicing and payments
- Route management and scheduling
- Chasing overdue invoices
- Customer communication

But they are much more cautious about ceding full control:

- 40% would never trust AI to fully handle invoicing/payments
- 28% wouldn’t trust it with quotes/estimates
- 19% wouldn’t trust it with customer communication

The clear takeaway: AI is welcome as an assistant, not as an autonomous agent—especially in revenue-critical tasks.



What this all means for the pool care tech stack in 2026

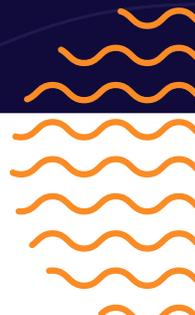
- 1. Suites first; point tools second**
The market has made it clear that software suites like Skimmer, paired with accounting tools, form the operational backbone of pool service. Add GPS or scheduling tools selectively if they create clear efficiency gains.
- 2. If you planned a suite last year, now's the moment**
The 2025 “we plan to buy software” group largely followed through on its plan. If your business was part of that cohort but hasn't acted yet, the gap between you and your competitors has likely widened.
- 3. Treat AI as a time-saver, not a replacement**
Lean into use cases where AI reduces workload or strengthens consistency—admin, reporting, follow-up—not areas where mistakes affect revenue or customer trust.
- 4. Address concerns early in your evaluation**
Build cost transparency, reliability checks, and data safeguards into any evaluation of a new tool. Training and onboarding matter more than the tool itself.
- 5. Consolidate your stack whenever possible**
The strongest operators are moving away from mixes of calendars, spreadsheets, and point apps. If you're still juggling tools, the cost is showing up in admin time, communication delays, and technician confusion.

The big picture

The software stack in 2026 looks cleaner, more consolidated, and more intentional than ever before. The industry has reached a point where the technology you choose directly impacts customer experience, technician reliability, billing accuracy, and your ability to grow without drowning in admin.

Owners aren't choosing tools because they're trendy; they're choosing tools that help them run a tight, professional shop. And the companies that invest today are the ones building the operational backbone that will separate them from competitors over the next few years.

“Owners aren't choosing tools because they're trendy; they're choosing tools that help them run a **tight, professional shop.**”



SIDEBAR

How to start using AI safely

1. Assess new tools carefully

There are heaps of AI tools flooding every market, but not all these tools are created equal. You must evaluate any new tech tools to ensure they fit with your existing tech stack and provide the supportive infrastructure for your growing business.

2. Begin with low-risk tasks

Drafting, summarizing, logging, documenting, and prepping—anything you already review anyway.

3. Layer it into existing workflows

Let AI help your current systems, not replace them. It's an assistant, not a tech or a bookkeeper.

4. Keep humans in the final loop

Especially in billing, quoting, and customer communication. "Human + AI" beats "AI alone" every time in this industry.

5. Set guardrails early

Define what AI can and cannot do in your operation. Clear boundaries prevent mistakes later.

6. Train staff intentionally

A short walk-through goes a long way. Most AI mistakes come from unclear instructions or rushed usage.

AI is ready to save you time, improve consistency, and tighten profitability—but it's not ready to run your business for you. The sweet spot for 2026 is using AI as a reliable assistant, not a replacement. Let it handle the grunt work while you and your team stay focused on what matters most—delivering great service and building strong customer relationships.

“The sweet spot for 2026 is using AI as **a reliable assistant**, not a replacement...”



CHAPTER 6

How pool pros are charging for services in 2026

Pricing is one of the most visible parts of a pool company’s operation, and in 2026, the market is settling into a clearer shape than we’ve seen in years. The picture that emerges is simple: monthly billing is the industry standard, while chemical policies continue to diversify as owners seek ways to protect margins amid a volatile cost environment.

The trends are steady, intentional, and grounded in real-world experience. Companies are focusing on predictable customer billing, tighter cost control, and more transparent repair practices.

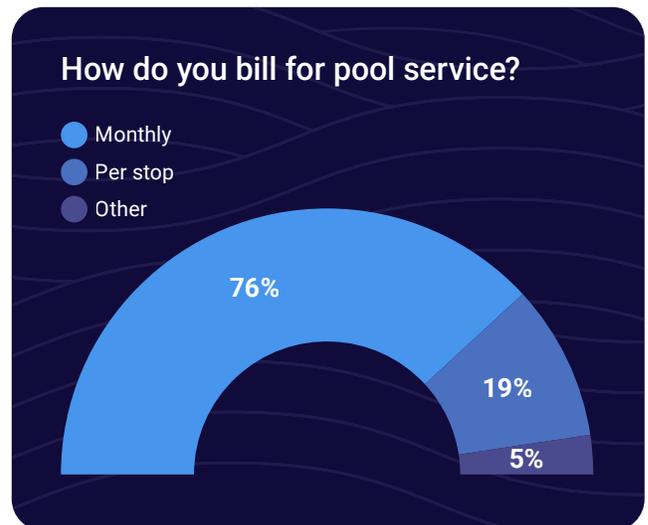
What do you charge for each of the following services (on average)?



Monthly billing remains the dominant model

Across the industry, monthly billing is the preferred foundation for service. In 2026, 76% of companies structure their contracts around monthly billing. Only 19% bill per stop, and a small 5% fall into “other” formats.

This isn’t a dramatic shift from 2025, but it is a solidification. The 2025 monthly share was 74%. That two-point climb shows a market leaning even harder into simplicity and predictability. Monthly models offer cleaner cash flow for owners, fewer billing surprises for customers, and tighter technician scheduling in the field.



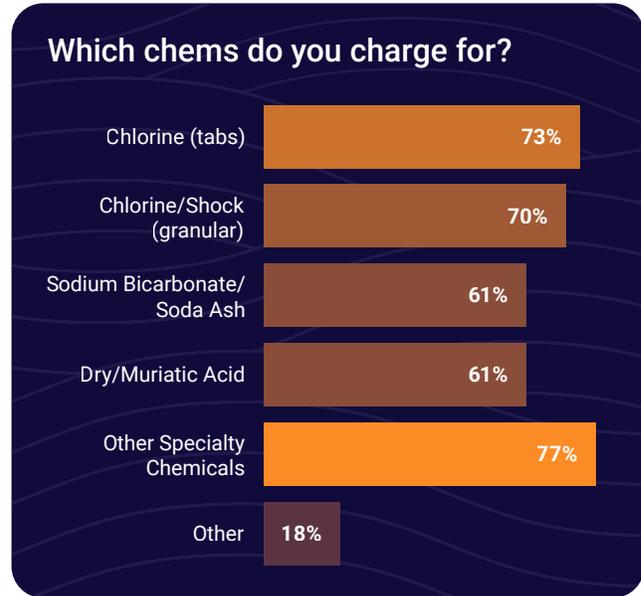
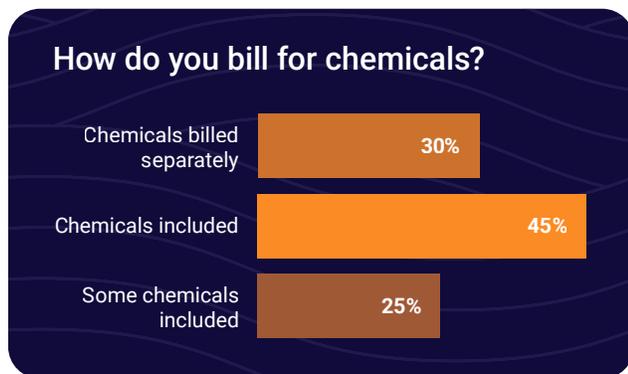
Chemical billing is moving in a new direction

How pool pros bill for chemicals is the biggest storyline in this year’s data. For years, most pros relied on “chemicals included” pricing. That model is shifting.

In 2026, companies report three major approaches:

- 30% separate chemicals as line items
- 45% include chemicals in the monthly price
- 25% use a hybrid model (“some included, some billed separately”)

For many owners, this shift is practical. Chemical costs have been unpredictable, and all-inclusive pricing makes it harder to absorb spikes in the prices of tabs, shock, sodium bicarb, and acid. Hybrid and plus-chemicals models give companies a way to stabilize margins without pushing service prices too high.



When chemicals are billed separately, the discipline is real

Among companies that use a separate or hybrid chemical model, billing is precise. The most commonly itemized materials include:

- Specialty chemicals
- Chlorine tabs
- Chlorine/shock
- Sodium bicarb/soda ash
- Dry acid/muriatic acid

This level of granularity shows that plus-chemicals isn’t a loose, catch-all approach. It’s a disciplined cost-tracking system. Companies that bill chems separately already operate with clarity around materials, usage patterns, and pool-by-pool cost behavior. It’s a helpful benchmark for firms that still include chems and want to tighten internal reporting.

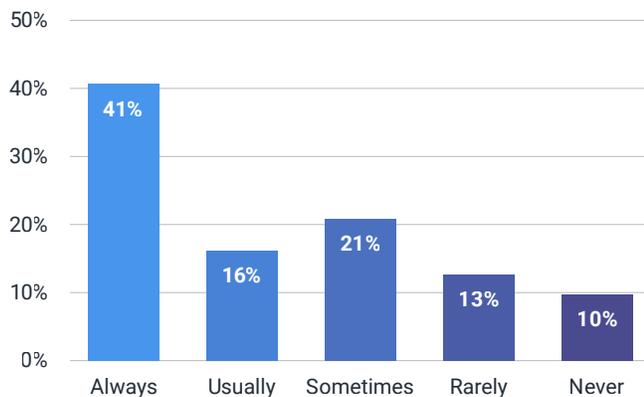
Repair deposits: A standard tool for cash-flow stability

Whether you include chems or not, repair work carries its own risk, and deposits have become the industry's main safeguard against surprise costs and customer drop-off.

The majority (57%) fall into the “always” or “usually” require-a-deposit bucket, demonstrating that deposits are no longer seen as friction. They're standard business practice.

Deposits help secure customer commitment, eliminate material risk, and smooth cash flow on large repairs, especially during busy months when delays can ripple through schedules.

How frequently do you require deposits for large repair work?



How operators should approach pricing in 2026

If you include chemicals

Be intentional about tracking usage. Weekly per-pool reporting and quarterly reviews help prevent margin erosion, especially on outlier pools with heavy consumption. Even if you're not billing chems separately, track them as if you were. Plus-chems users set a strong example of disciplined internal reporting.

If you use a hybrid model

Define your rules clearly. Ambiguity (“some included”) can create misunderstandings with customers unless thresholds and categories are well-documented. Standardize what's included, what's billed separately, and how customers will see it on reports.

If you charge chems separately

Keep your billing consistent. Customers appreciate clear labels and explanations. Continue capturing major materials as line items—chlorine tabs, shock, acid, specialty products—and ensure your reporting reflects actual usage.

For repair work

Stick to a deposit policy, as our data shows this is the industry norm. Publish your minimum deposit amounts and tie them to job size or parts requirements. Doing so reinforces professionalism and reduces last-minute churn.

The bottom line

The pricing landscape in 2026 is defined by clarity and control. Monthly billing has become the backbone of the industry, giving companies predictable revenue and simpler workflows. Chemical policies are evolving toward greater transparency, whether through hybrid models or itemized billing. And deposits have become a dependable tool for managing repair risk.

The companies gaining the most ground are the ones bringing rigor to their pricing by tracking chemical costs, standardizing line items, defining deposit rules, and ensuring customers understand what they're paying for and why.

Pricing isn't only about revenue; it's about stability. And the more intentional your structure, the easier it becomes to grow without sacrificing margins or customer trust.

SPOTLIGHT

Where pool pros buy parts & supplies: What changed year-over-year

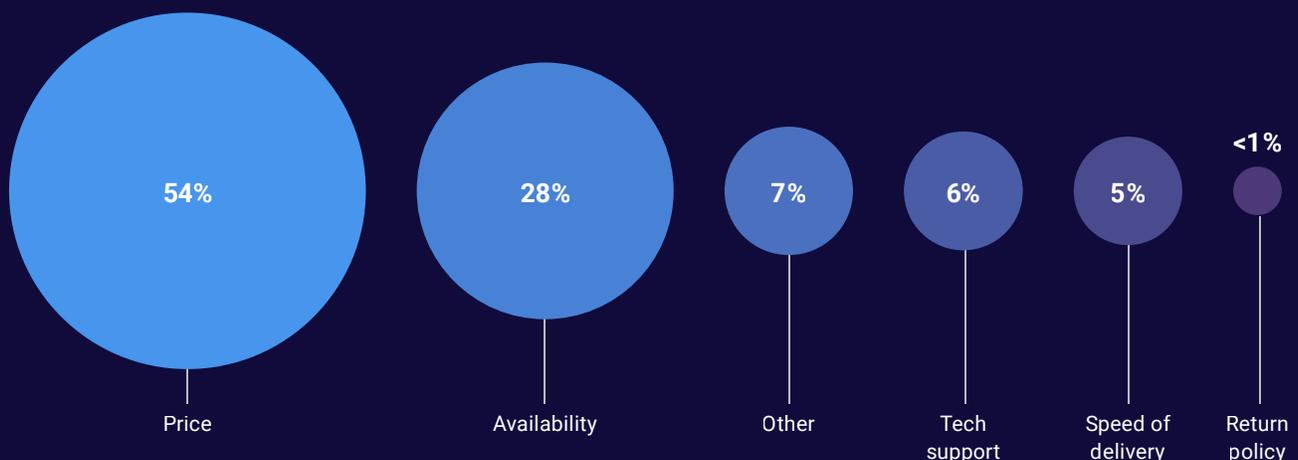
The year-over-year view shows a market that's steady at the core, but quietly modernizing at the edges.

- **Local distributors still dominate:** In-person purchasing held essentially flat (79% → 78%), reinforcing that counter service remains the backbone for urgent needs, advice, and same-day availability.
- **Distributor delivery is rising:** Delivery from local distributors increased (53% → 56%). That's a meaningful signal: pros still want distributor relationships, but with less windshield time.
- **Online purchasing is expanding**—especially outside pool-specific sites:
 - Online pool retailers grew (30% → 36%)
 - Online non-pool retailers (Amazon, big box online, etc.) grew (41% → 45%)
- **Buying groups are unchanged** (5% → 5%) and "Other" is flat (2% → 2%), suggesting the shift is happening within existing, familiar channels, not from a sudden new player.

In short, pool pros aren't abandoning local distributors. They're adding flexibility—more delivery, more online, more options.

What pros say matters most when choosing a distributor

That flexibility makes more sense when you look at what pros are optimizing for when they decide where to buy:



Two priorities—price and availability—account for the vast majority of decision-making. That explains why distributors remain the anchor while online and delivery keep gaining share: pros are using more channels to hit those two goals more consistently.

SPOTLIGHT

The forces behind the shift

1. Price pressure + easy comparison is expanding buying behavior

When price is the top driver, pros naturally weigh their options, and online shopping makes comparison effortless. Even if a pro prefers to buy local, online options serve as the reference point for commodity items and replenishment supplies. That leads to a more strategic mix:

- Buy locally when it saves a costly return trip to finish a job
- Buy online when the item is standard, repeatable, and easy to ship
- Use online pricing visibility to validate whether a local purchase is “worth it” for the speed and certainty

2. Availability keeps the local distributor at the center

Availability is the second-biggest factor, and it’s where the local distributor continues to win, especially for urgent needs. The reason in-person distributor purchasing stayed nearly unchanged is simple: when something breaks, and the customer wants it fixed now, availability beats everything.

Pros still rely on local distributors for:

- Same-day parts in an emergency
- Confidence that the part is correct before leaving the counter
- Hard-to-ship items or specialized equipment
- Quick substitutions when the ideal part isn’t in stock

At a practical level, availability is also about reducing risk: fewer callbacks, fewer second trips, fewer unhappy customers.

3. Pros are using a “hybrid purchasing” playbook

The data doesn’t show channel replacement. It shows channel stacking: pros are matching the channel to the situation.

- **In person at the distributor** for: urgent repairs, complicated equipment questions, warranty scenarios, “need it today” parts
- **Distributor delivery** for: planned installs, weekly restocks, and larger orders that are annoying to haul
- **Online (pool retailers)** for: breadth of selection, easy comparison, niche items
- **Online (non-pool retailers)** for: commodity goods and tools, fast shipping, simple reorders

This is why in-person holds steady while delivery and online both rise. The distributor remains critical, but pros are building redundancy into their supply chain.

4. Delivery can rise even if “speed of delivery” isn’t a top-stated priority

At first glance, it might seem odd that distributor delivery increased while only 5% say delivery speed is the most important factor. The key is that delivery isn’t only about speed, it’s about time protection.

Delivery reduces:

- Windshield time
- Mid-day schedule disruption
- Labor spent on supply runs
- The chaos of “we’ll swing by the distributor after this stop”

So even if delivery speed isn’t the deciding factor when choosing a distributor, delivery as a service becomes more attractive as route density increases and calendars get tighter.

SPOTLIGHT

5. Tech support is a quiet differentiator that keeps relationships sticky

Tech support isn't the top driver overall, but it matters a lot in high-stakes moments—equipment troubleshooting, compatibility questions, and warranty situations. That's a type of value online channels struggle to replicate consistently.

It's also one of the reasons local distributors can remain the primary channel even when price pressure pushes more purchases online: when something is complex, pros still want a human who can help them get it right the first time.

6. Return policies aren't driving decisions, but can still affect trust

A return policy rarely shows up as a #1 factor unless something is going wrong. Most pros treat it as table stakes and only think about it when it becomes painful. Even though it's not directly driving the channel shift, it can influence long-term loyalty, especially for higher-ticket items.

What this means for the industry

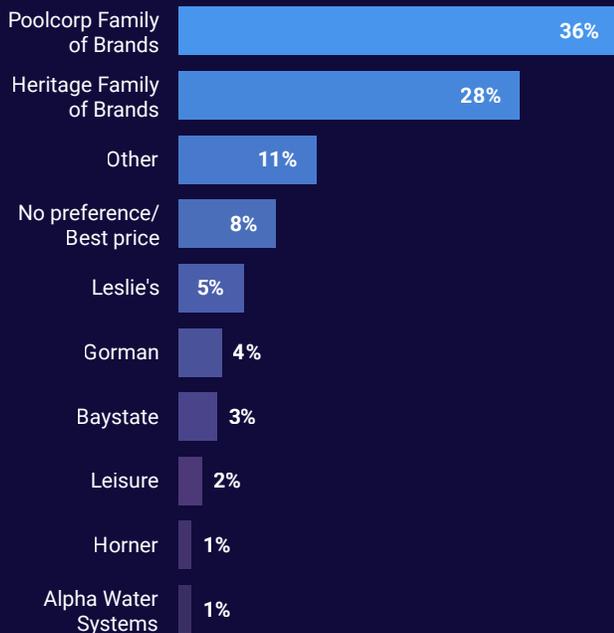
This isn't a story about distributors losing relevance. It's a story about pros expecting distributors to meet them where they are:

- Fast ordering
- Dependable fulfillment
- Delivery options that reduce time waste
- Inventory confidence to avoid wasted trips

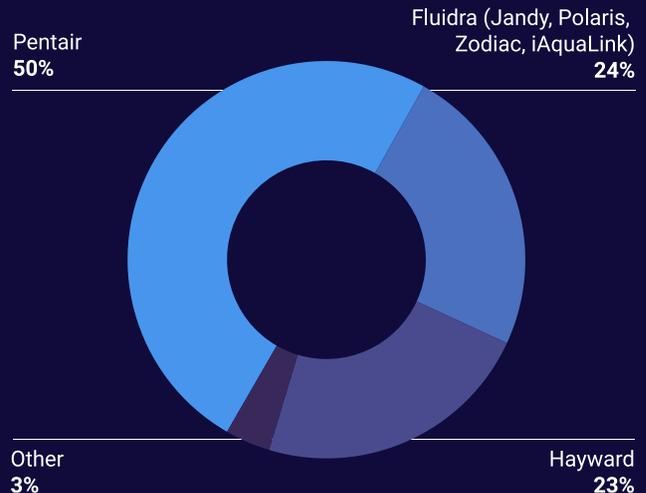
More online purchasing isn't a rejection of local suppliers. It's a sign that pool businesses are operating with tighter schedules and more disciplined procurement, and choosing the channel that best satisfies price and availability in the moment.

The headline isn't "pros are going online." Its pros are buying smarter and keeping the distributor counter for availability and expertise, while leaning more on delivery and online ordering to control costs, reduce wasted time, and keep the workday moving.

What is your preferred pool supply store?



What is your preferred equipment brand?



CHAPTER 7

The private equity roll-up era and what it means for independent pool pros

Private equity has become an increasingly visible force in the pool service world. PE firms are increasingly buying routes, rolling up local companies, and entering markets once dominated by independents.⁷ But while PE activity gets a lot of attention, most pool business owners approach it with a measured, cautious mindset. The 2026 data paints a picture of an industry that’s watching these moves closely, weighing potential advantages against the risks, and staying focused on running disciplined, customer-centered operations.

How owners feel about PE roll-ups

When asked how they view PE-driven consolidation in the industry, most pool business owners land squarely in the middle.

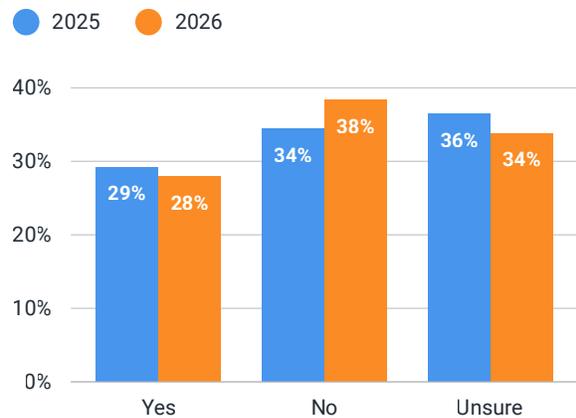
This “mixed but mostly neutral” stance matches what we saw last year. In fact, sentiment shifted only slightly year over year, with a small tilt toward the positive. Overall favorability improves by 2 percentage points, driven by a very slight rise in positive sentiment and a modest dip in neutral responses.

That tells us something important: PE consolidation isn’t seen as universally good or bad; it’s seen as something to evaluate on a case-by-case basis.

Would owners sell to private equity?

The data becomes even more nuanced when the question shifts from industry perception to personal willingness to sell.

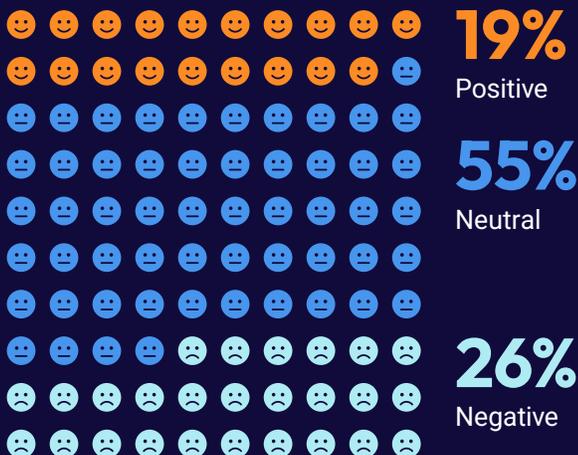
If you were approached to sell your company to a private equity firm, would you consider it?



Compared to 2025, the 2026 sentiment tilts toward caution. The share who say “no” rises by nearly four percentage points, while both “yes” and “unsure” decline. More owners are keeping their options open but leaning away from selling right now.

This aligns with the operating environment: strong demand, solid revenue growth, rising professionalism, and a desire to keep building value independently.

Within the pool service space, there has been an increase in private equity investment leading to company roll-ups. How do you view this for the industry?



We expect this tension to persist when it comes to PE in the pool care space. Owners certainly see the potential for better access to equipment, more reliable parts supply, and greater operational scale when partnering with PE firms, but they also worry about price pressure, customer churn, and losing the personal service that defines their businesses.

Most pros aren't anti-PE, they're simply realistic. They're watching how these roll-ups behave before deciding what it means for their business.

⁷Founders Advisors. 2025 Pool Services Market M&A Update. 2025.
www.foundersib.com/core/uploads/2025/09/2025-Pool-Services-Market-MA-Update.pdf

“More owners are keeping their options open but leaning away from selling right now.”



SIDEBAR

How to evaluate a PE offer: A practical checklist for owners

Private equity interest can be flattering and confusing. A strong offer can accelerate your plans, but a rushed decision can lock you into terms that don't align with how you run your business. Use this checklist to evaluate any PE conversation with clarity and confidence.

1. Understand what they're actually buying

Clarify whether the buyer is purchasing:

- Your customer list
- Your routes
- Your technicians
- Your brand and reputation
- Your systems and processes
- Your personal involvement or leadership

PE-backed groups vary widely. Some want fully absorbing acquisitions; others want a partnership. Make sure you understand what you're being offered.

2. Ask about the post-sale operating model

This determines what your day-to-day life looks like after the deal. Ask:

- Will service quality standards change?
- What happens to your technicians?
- What tools and systems will your business be required to use?
- Will you be expected to stay on—and for how long?
- Who sets service pricing going forward?

You want clear expectations, not surprises.

3. Get clarity on financial terms

Beyond the top-line number, dig into the structure:

- What portion is cash vs. earn-out?
- What performance metrics affect the earn-out?
- How are equipment, vehicles, and inventory valued?
- Are there clawbacks or adjustments if accounts churn?

Earn-outs tied to unrealistic goals often reduce the offer's true value.

4. Protect your employees

Technicians and back office staff are the backbone of your business. Ask the buyer:

- Will they retain your staff?
- How will compensation and benefits change?
- Will routes be reorganized?
- How will performance be evaluated?

A sale that destabilizes your team can harm your reputation and long-term earnings.

5. Review customer impact

Customers may face changes in:

- Pricing
- Visit consistency
- Communication style
- Technician continuity
- Repair recommendations and upsell practices

Your name and reputation are tied to how these customers are treated, even after you step away.

6. Understand the buyer's timeline

PE groups operate on defined investment cycles. Ask:

- What is their planned hold period (often 3–7 years)?
- What happens when they exit their investment?
- Are they building a long-term service brand or preparing for resale?

You're not just evaluating one transaction—you're evaluating the next one too.

7. Assess cultural fit

This matters more than most owners expect. Consider:

- Do they respect how your business operates?
- Do they understand the pool service industry?
- Do they emphasize customer experience or cost control first?
- Are they transparent and straightforward in negotiation?

A poor cultural fit leads to headaches, not opportunity.

8. Ask for references

Any credible buyer should be willing to connect you with:

- Other companies they've acquired
- Owners who stayed on
- Owners who exited immediately
- Technicians who transitioned under their model

These conversations often reveal more than any term sheet.

9. Protect yourself with advisors

Before signing anything:

- Hire a lawyer familiar with service-business acquisitions
- Consult a tax professional
- Consider having a valuation specialist review the offer
- Document every promise made verbally

A strong advisory team often pays for itself many times over.

10. Know your walk-away number—and your goals

The right offer depends on your timeline and personal plans. Ask yourself:

- Do I want to stay involved for a few years?
- Do I want to fully exit?
- Do I want to grow with outside capital instead of selling?
- What price makes the trade-off worth it?

If the offer doesn't support your next chapter, it's not the right time.

The bottom line

Private equity isn't a threat or a lifeline on its own; it's one of several forces shaping the evolution of the pool and spa service industry. The operators who navigate this landscape most effectively approach every outside influence with the same mindset they bring to daily operations: understand the facts, protect the customer experience, and make decisions that support long-term stability.

What stands out in the 2026 data is a sense of steadiness. Even with consolidation, regulatory shifts, and changing market dynamics, most owners continue to invest in stronger systems, more consistent service, and clearer

communication. They're watching the external pressures, but they're not letting those pressures dictate their future.

The companies that outperform in this environment will be the ones that treat external forces like private equity as variables, not drivers. They'll stay disciplined, refine their operations, build resilient teams, and move decisively when the right opportunities appear. In a year defined by measured confidence, the strongest advantage any operator can have is a business built on fundamentals that hold up no matter how the market shifts.



LOOKING FORWARD

Winning the next phase of pool service



The 2026 data tells a clear story: the pool service industry isn't entering a year of upheaval. It's entering a year of steady, disciplined growth built on stronger fundamentals than ever before. Demand is holding firm, revenue expectations are rising, and operators are running more structured, predictable businesses. The companies gaining ground are the ones putting systems in place that make their work more consistent, more profitable, and easier to scale.

Across every section of this report—pricing, staffing, marketing, operations, software, and external forces—the same themes repeat. The operators who succeed in 2026 will focus on four priorities:

1. **Protect margin with clear, disciplined pricing**

Costs, especially those associated with chemicals, materials, and transportation, remain unpredictable, and the businesses that protect profitability take small, intentional pricing steps that customers understand. With most pros planning modest increases of 10% or less and hybrid chemical models gaining traction, the goal is simple: stay ahead of cost creep without surprising customers.

A disciplined approach includes:

- Reviewing costs at the pool level
- Using hybrid or itemized chemical billing when it protects margins
- Communicating adjustments early and clearly
- Tracking chemical outliers and tightening internal reporting

Pricing stability builds trust. Pricing clarity builds margin. Both matter in 2026.

2. **Build a team that can deliver consistency**

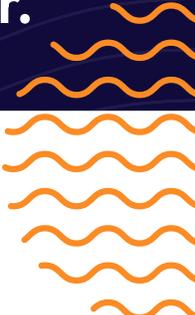
More companies are planning to hire in 2026, but they aren't growing recklessly. Teams are expanding when routes justify it with a strong emphasis on technician training, service quality, and process discipline.

In 2026, owners should:

- Strengthen onboarding and technician training programs
- Use W-2 models or clear contractor standards to tighten consistency
- Protect technician time with better routing and better tools
- Build simple QA systems (report checks, callbacks, water balance monitoring)

A business's reputation now depends as much on consistency of service as on the quality of the water. The companies that win are the ones whose service looks the same whether they have 50 clients or 500.

“**A business's reputation now depends as much on consistency of service as on the quality of the water.**”



3. Treat marketing as a permanent, structured function

The data shows marketing is no longer optional or experimental; it's a required operational discipline. Paid budgets remain small, but owners are investing with intention. Referrals, SEO, and paid search continue to dominate, while paid social plays a supporting role for visibility and recruitment.

To build a durable 2026 pipeline:

- Systematize referrals with prompts, review generation, and simple rewards
- Invest consistently in local SEO and Google Business Profile optimization
- Use modest search budgets to capture high-intent leads
- Anchor social content in education, repair credibility, and real service work
- Use agency support or hybrid models when in-house time is limited

This is a year to treat marketing like part of the job, not something you “get to when you can.”

4. Consolidate operations and modernize the software stack

The most confident businesses in this year's survey are also the most systematized. All-in-one field operations platforms are becoming standard, paired with accounting tools and selective add-ons for GPS or quoting. AI is emerging as a practical assistant rather than a replacement, best used for admin tasks, communication prep, documentation, and scheduling support.

In 2026, owners should:

- Consolidate point tools into a unified platform where possible

- Use software to eliminate administrative waste
- Strengthen reporting (photos, chem logs, visit notes) to match customer expectations
- Introduce AI slowly in low-risk areas to reclaim time
- Keep humans in the loop for anything tied to revenue or customer trust

Operators who modernize their operations are widening the performance gap. The difference shows up in profitability, customer retention, and technician consistency.

5. Keep optionality around PE and external forces

Private equity, tariffs, regulation, and economic conditions all play a role—but none of them define the year. Most businesses aren't planning to sell, yet many want to maintain optionality. Clean books, documented SOPs, route density, and predictable cash flow all increase leverage.

Regardless of whether an owner plans to sell someday, the same habits drive success:

- Track unit economics
- Maintain updated financials
- Document processes
- Build a resilient customer experience
- Know your numbers and revisit them quarterly

External forces shape the environment, but they don't determine outcomes. Operators who stay informed—but not reactive—run stronger companies in any climate.

What success looks like in 2026

The next year favors businesses that are:

- **Disciplined** in pricing
- **Selective** in hiring
- **Systematic** in marketing
- **Consistent** in service delivery
- **Digitally mature** in their operations
- **Prepared, not apprehensive**, about consolidation or regulation

The industry is stabilizing and maturing. Demand is steady. Customer expectations are rising. Tools are improving. And the gap between “organized” and “winging it” is growing wider.

For operators ready to lean into the fundamentals—tight processes, clear pricing, better tools, consistent communication—2026 offers one of the most predictable growth landscapes the industry has seen in years.

“The industry is **stabilizing and maturing**. Demand is steady. Customer expectations are rising. Tools are improving.”



APPENDIX

Resources to help you grow your pool service business in 2026



[Breaking Into Profitable Pool Repairs & High-Margin Services](#)

Type: On-demand webinar + webinar recap

Description: Webinar recap with experts from Watershape University, Orenda/HASA, and Skimmer on how to move beyond weekly service into repairs and renovations, price higher-margin work with confidence, and use tools like Quotes, Jobs, and consumer financing to win bigger projects.

[Hire, Train, Retain: Building Rockstar Pool Service Teams](#)

Type: On-demand webinar + webinar recap

Description: Summary of Skimmer’s webinar with Kyle Peter (Nevergreen Pools) on attracting the right candidates, interviewing, writing offers, onboarding techs, setting KPIs, and keeping high-performers engaged as you grow your team.

[From Skimming to Scaling: 5-Stage Roadmap for Pool Business Growth](#)

Type: Ebook

Description: Casey Graham’s 5-stage framework for pool service owners that helps you pinpoint your revenue stage, clarify your Owner’s Intent, and follow stage-specific action steps to break bottlenecks, boost profit, and build a business that runs on systems instead of burnout.

[Skimmer Service Rate Index: Pool Service Pricing Benchmarks](#)

Type: Interactive tool

Description: Interactive pricing benchmark tool built from anonymized data from 30,000+ Skimmer users, showing average service rates by state, region, and billing model (per stop, per month, plus chems, including chems) so you can gut-check your pricing against the market.

[Marketing 101 for Pool Pros: Get More of the Right Customers](#)

Type: Ebook

Description: A practical ebook that walks pool service owners through building a high-converting website, running effective Google and Facebook ads, using Yelp and Thumbtack, and turning reviews into a steady flow of ideal customers.

[Guide to Growing Your Pool Service Business](#)

Type: Ebook

Description: Free guide that covers how to dial in your pricing, attract and retain the right customers, and maximize revenue—plus how Skimmer supports growth with route management, customer communication, chem tracking, reporting, and billing.

[Pool Service Price Increase Toolkit](#)

Type: Toolkit

Description: Downloadable toolkit with templates and resources to plan, communicate, and roll out a price increase so you protect margins, keep customers informed, and grow revenue with confidence.

[Customer Price Increase Messaging Template \(Casey Graham\)](#)

Type: Template

Description: Done-for-you language, email copy, and talking points from Casey Graham to explain price increases clearly, handle pushback, and reinforce the value of professional pool service.

[Pool Service Technician Job Description & Offer Letter Template](#)

Type: Template

Description: Editable job description and offer letter structure for hiring field technicians, outlining responsibilities, requirements, compensation, and expectations for residential pool routes.

[Sample Job Description & Offer Letter – Hiring Webinar 2025](#)

Type: Template

Description: Example role description and offer package you can adapt for your own hiring, including role overview, benefits, and clear performance expectations for new team members.

[Sample Employee Handbook – Nevergreen Pool Service](#)

Type: Template

Description: Real-world handbook from Kyle Peter's Nevergreen Pools outlining company policies, culture, standards, and day-to-day expectations you can model when formalizing your own employee guidelines.

[Pool Technician Interviewing Guide](#)

Type: Guide

Description: Structured interview guide with question prompts, evaluation criteria, and red-flag indicators to help you consistently identify strong technician candidates.

[Technician Levels & Advancement Path](#)

Type: Guide

Description: Written framework that defines tech levels, skill requirements, and promotion paths so your team sees a clear career ladder and knows what it takes to advance.

[Technician Levels & Advancement Path Spreadsheet \(Nevergreen Hiring Webinar 2025\)](#)

Type: Tool

Description: Spreadsheet version of the tech ladder that breaks out levels, pay bands, competencies, and milestones in a format you can plug into your own comp and promotion planning.

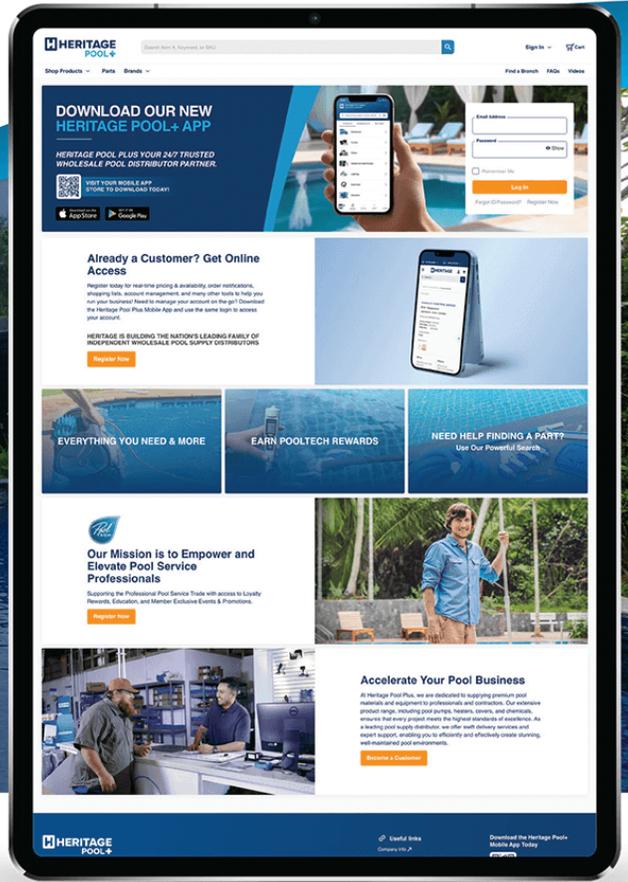
[New Hire Onboarding Checklist](#)

Type: Checklist

Description: Step-by-step onboarding checklist and SOP modeled on Nevergreen's process so every new technician gets a consistent, thorough ramp-up experience from day one.



ADVANTAGES OF SHOPPING ONLINE WITH HERITAGE POOL+



YOUR TRUSTED PARTNER 24/7



Live Inventory



Interactive Exploded Parts Diagram



Customize Shopping Lists



AI Assisted Search Chat



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Displays Personalized Pricing



Quick Search



Order Notifications



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- Push Notifications
- Talk to Search
- Facial Recognition

Thanks to our partners

Thank you to all the individuals and organizations who helped make this report a reality.

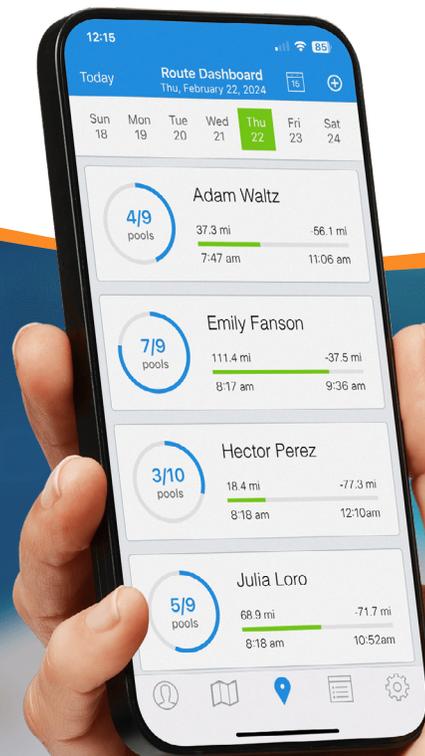


About Skimmer

Skimmer is America's #1 pool service software platform.

The company is on a mission to modernize the pool and spa service and repair industry through easy-to-use software and best-in-class support. Over 35,000 pool service professionals servicing 1,000,000+ pools in North America use Skimmer to get organized, get paid faster, and grow their businesses.

For more information about this report, Skimmer, or our products and services, please visit www.getskimmer.com.



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