



INDUSTRY REPORT

The State of Pool Service 2025

Insights on strategies, priorities and challenges from 30,000+ pool pros managing 700,000 pools per year.

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Executive Letter

Dear Pool Professionals,

As we reflect on the past year, it's clear that the pool service industry is undergoing a transformation. The demand for reliable, skilled pool service has never been higher, fueled by the growing number of pool owners who see their spaces as essential for connection, relaxation, and wellness. Alongside this, the expectations for efficiency and professionalism in the industry have risen, creating both challenges and exciting opportunities for all of us.

At Skimmer, we've had the privilege of working alongside thousands of pool professionals who are rising to meet these demands with expertise and dedication. We're proud to support you, not only as a technology provider but as a trusted partner in your growth. Over the past year, we've seen inspiring examples of how pool pros are embracing new tools, expanding their businesses, and redefining what it means to deliver exceptional service.

This year was particularly exciting for Skimmer. We secured additional funding to accelerate our mission of helping pool professionals succeed. This milestone represents more than just an investment in our company—it's an investment in you. These resources allow us to fast-track our product development and introduce innovative features that make running your business easier and more efficient. We've already begun laying the groundwork for exciting advancements that you'll see in the coming months.

As we look towards the next 12 months, we're eager to continue meaningfully supporting this incredible industry. Whether it's by enhancing Skimmer's platform, sharing insights and best practices, connecting pool pros in our Pool Deck Community, or amplifying your stories of success, we are committed to being more than a technology solution. We aim to be a resource, a partner, and a source of inspiration as you build thriving businesses and elevate the pool service profession.

The future of pool service is bright, and we're honored to be a part of it with you. On behalf of the entire Skimmer team, thank you for your trust, your feedback, and your unwavering commitment to excellence. Together, we'll make 2025 a year of remarkable growth and innovation for this industry.

Warm regards,

Jack Nelson
CEO, Skimmer



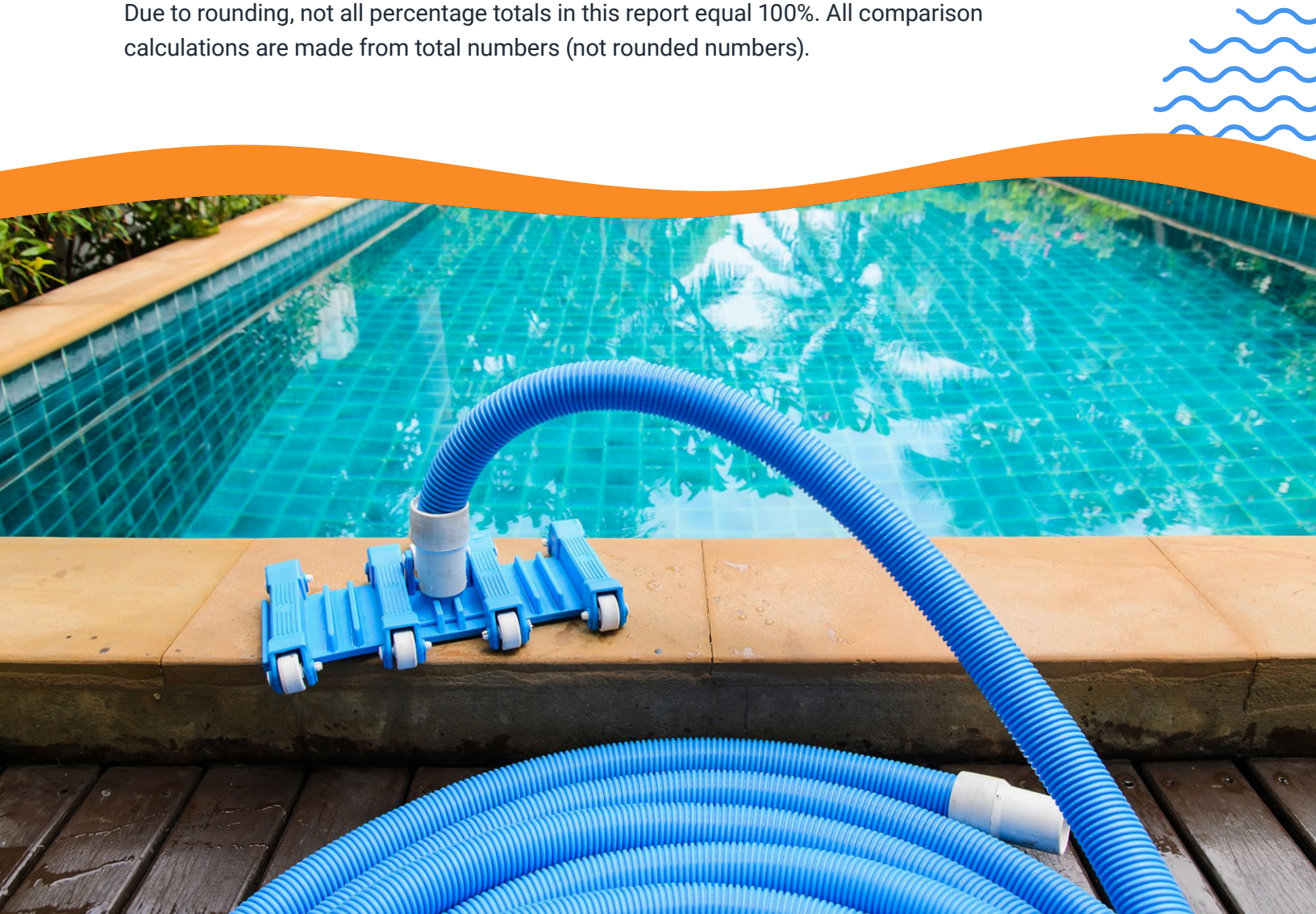
What You'll Find In This Report

For the second edition of the State of Pool Service report, we surveyed more than 2000 pool pros (a mix of Skimmer and non-Skimmer customers) to learn how they are:

- Using more sophisticated strategies to hit 2025 growth goals, despite macroeconomic challenges.
- Structuring their businesses and charging for their services.
- Adjusting to a market that's changing and modernizing.

This report provides a retrospective on 2024, including year-over-year comparisons with 2023, as well as a look forward to 2025. It combines survey responses, platform data aggregated from the activity of over 30,000 Skimmer users servicing more than 700,000 pools monthly, and market research from the pool service industry.

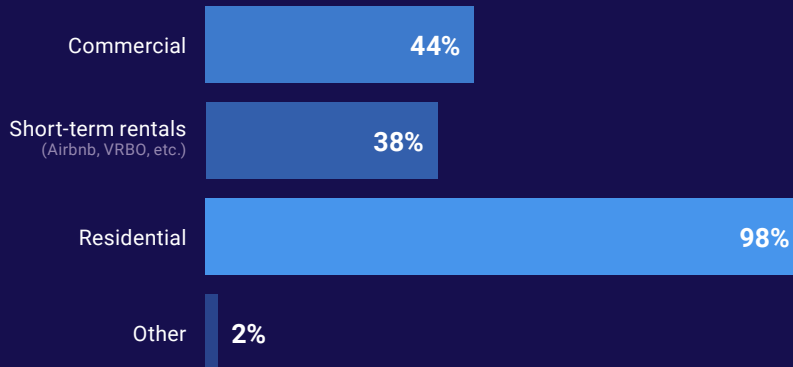
Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers).



SURVEY DEMOGRAPHICS

Respondent Firmographics

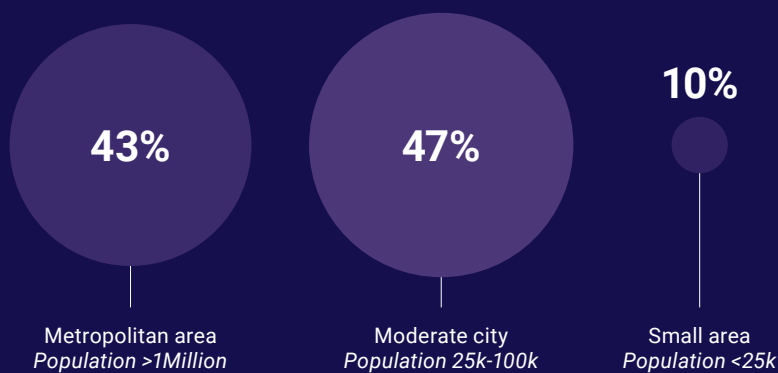
Types of customers serviced



Open year-round



Size of area serviced



Current role

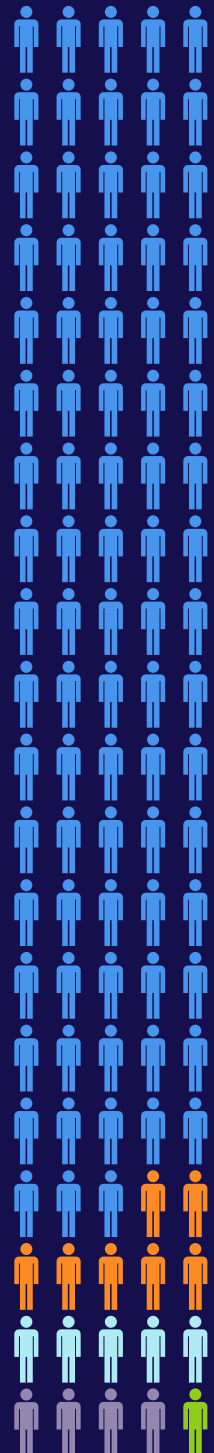
82%
Owner/CEO/
President

7%
Office
Manager

5%
Executive
(VP, GM)

4%
Other

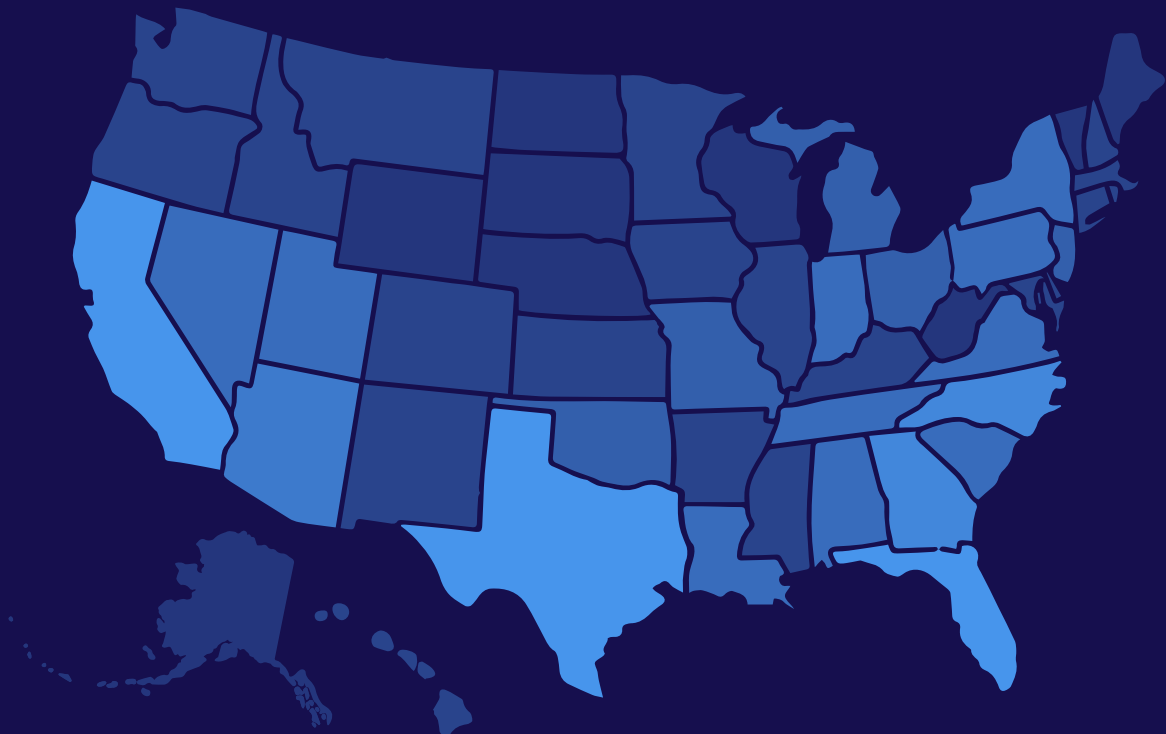
1%
Technician



SURVEY DEMOGRAPHICS

Respondents By State

Texas	19%	Missouri	1%	Minnesota	<1%
Florida	17%	New Jersey	1%	Mississippi	<1%
California	16%	Ohio	1%	Montana	<1%
Arizona	7%	Oklahoma	1%	New Hampshire	<1%
Georgia	3%	Other (Outside USA)	1%	New Mexico	<1%
North Carolina	3%	Arkansas	<1%	Oregon	<1%
Alabama	2%	Colorado	<1%	Rhode Island	<1%
Indiana	2%	Connecticut	<1%	Washington	<1%
Louisiana	2%	Delaware	<1%	Alaska	0%
Nevada	2%	Hawaii	<1%	Maine	0%
New York	2%	Idaho	<1%	Nebraska	0%
Pennsylvania	2%	Illinois	<1%	North Dakota	0%
South Carolina	2%	Iowa	<1%	South Dakota	0%
Tennessee	2%	Kansas	<1%	Vermont	0%
Utah	2%	Kentucky	<1%	West Virginia	0%
Virginia	2%	Maryland	<1%	Wisconsin	0%
Michigan	1%	Massachusetts	<1%	Wyoming	0%



Budgets

Pool service company budget & staff breakdown

How pool service company owners are allocating their budgets for 2025

35%

34% in 2024

People-related expenses
(salaries, benefits, etc.)

33%

35% in 2024

Pool maintenance-related expenses
(chemicals, equipment, mileage, etc.)

14%

12% in 2024

Office-related expenses
(rent, building overhead, etc.)

8%

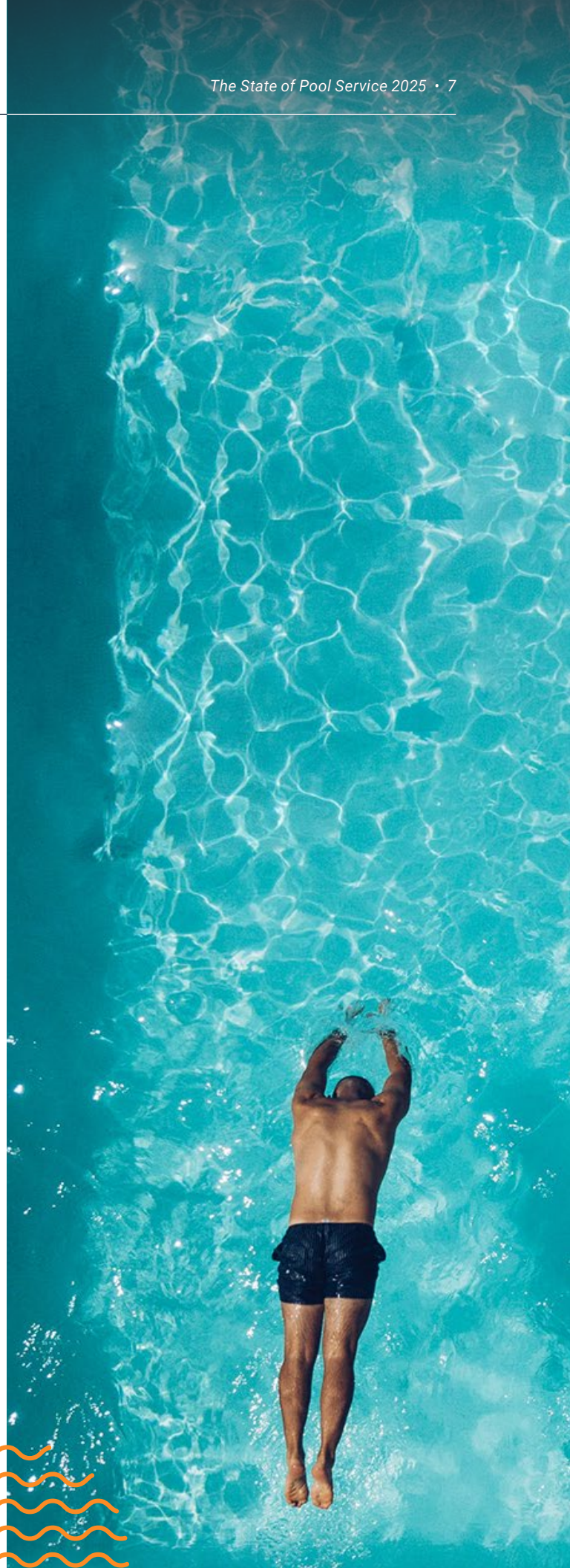
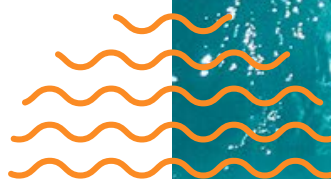
12% in 2024

Software and technology

10%

7% in 2024

Marketing (paid ads, direct mail,
event sponsorships, etc.)



Executive Summary

- 1 The economy was the top challenge for pool pros in 2024, and this trend is expected to continue in 2025.** Economic pressure such as inflation and labor shortages were the leading concerns for pool pros in 2024 and these challenges will persist into 2025. The good news is that pool service businesses are well placed to remain adaptable and proactive in managing costs while maintaining service quality.
- 2 Pool pros are optimistic about 2025 and will continue to leverage moderate price increases to stay ahead of rising costs.** Despite ongoing economic challenges, pool professionals are approaching 2025 with optimism. Strategic price adjustments are a key tactic they plan to employ to balance rising material and labor expenses, ensuring they stay competitive while preserving profit margins.
- 3 Pool pros are getting more sophisticated in their growth strategies.** Professionals in the pool industry are adopting more nuanced and data-driven approaches to business expansion. From diversifying service offerings to investing in technology and employee training, many are prioritizing sustainable growth through innovation and operational efficiency.
- 4 The influx of private equity in the market is generating mixed reactions.** Private equity investments are reshaping the pool industry, providing opportunities for growth but also raising concerns among smaller businesses. While some view this trend as a chance to scale their operations, others fear losing autonomy and a drop in service quality.
- 5 The industry marketing landscape has shifted considerably over the past 12 months.** The past year has seen significant changes in how pool businesses approach marketing. From decreased reliance on lead buys to a growing focus on customer engagement, businesses are adopting savvier and more advanced marketing techniques.
- 6 Despite price volatility, pros have been slow to adopt a plus chems pricing model.** Although fluctuations in chemical prices have posed a challenge, many pool pros have yet to fully embrace the “plus chems” pricing model. Resistance to change, concerns about customer pushback, and a lack of industry-wide adoption have contributed to the slow transition.

Introduction

The pool and spa service industry is a unique market.

While the businesses that operate here are subject to the same macroeconomic factors impacting many North American businesses, a number of opportunities have made them well-placed to weather economic uncertainty.

According to IBISWorld, the swimming pool cleaning services market in the US is seeing positive growth for a number of reasons, notably continued demand for pool construction, more households earning more than \$100,000 (and a related rise in per capita disposable income), higher consumer spending, and demand from property management and hotels.¹

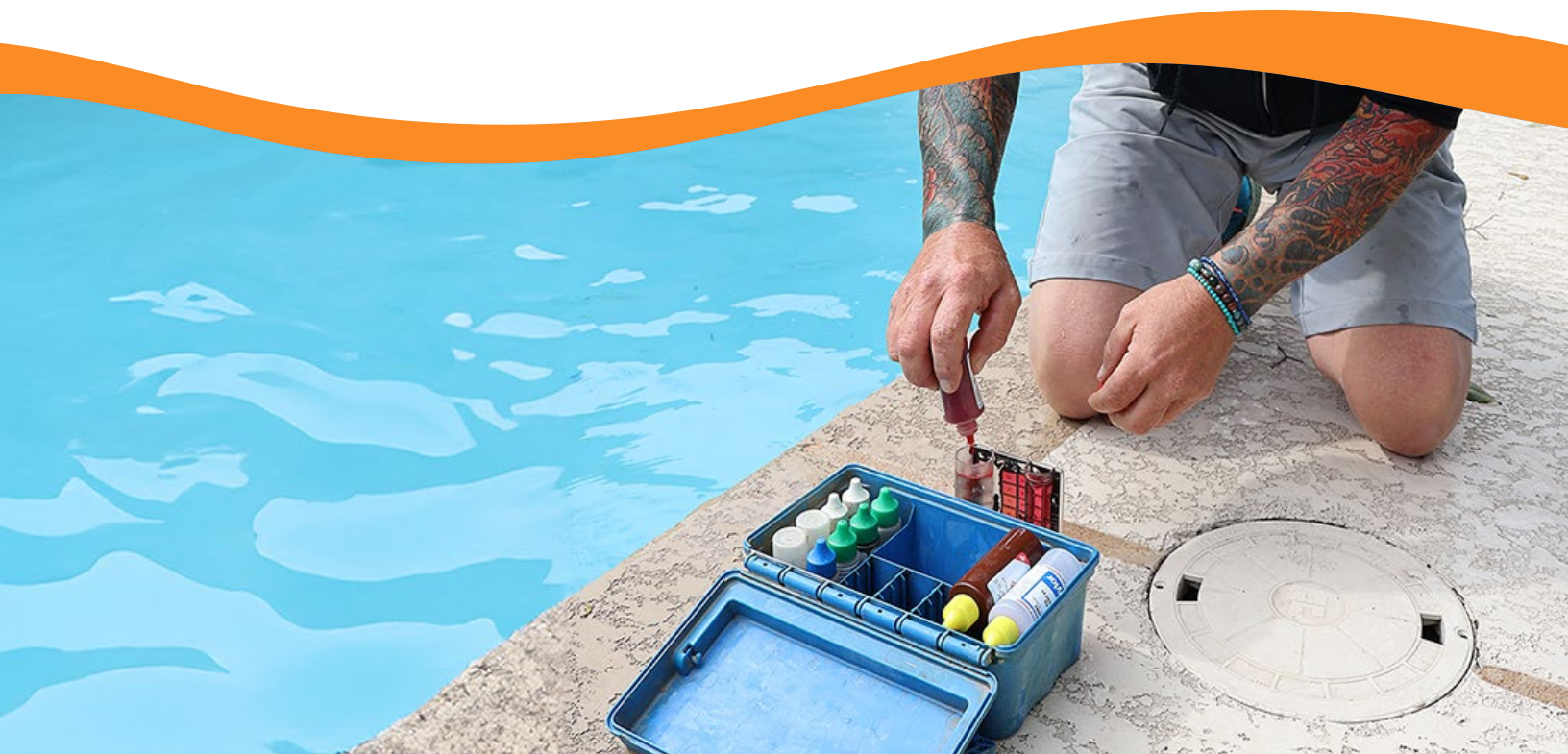
Industry opportunities

- Increase in consumer spending
- Increase in per capita disposable income
- Increased demand from property management
- Increased demand from hotels and motels
- Demand for swimming pool construction

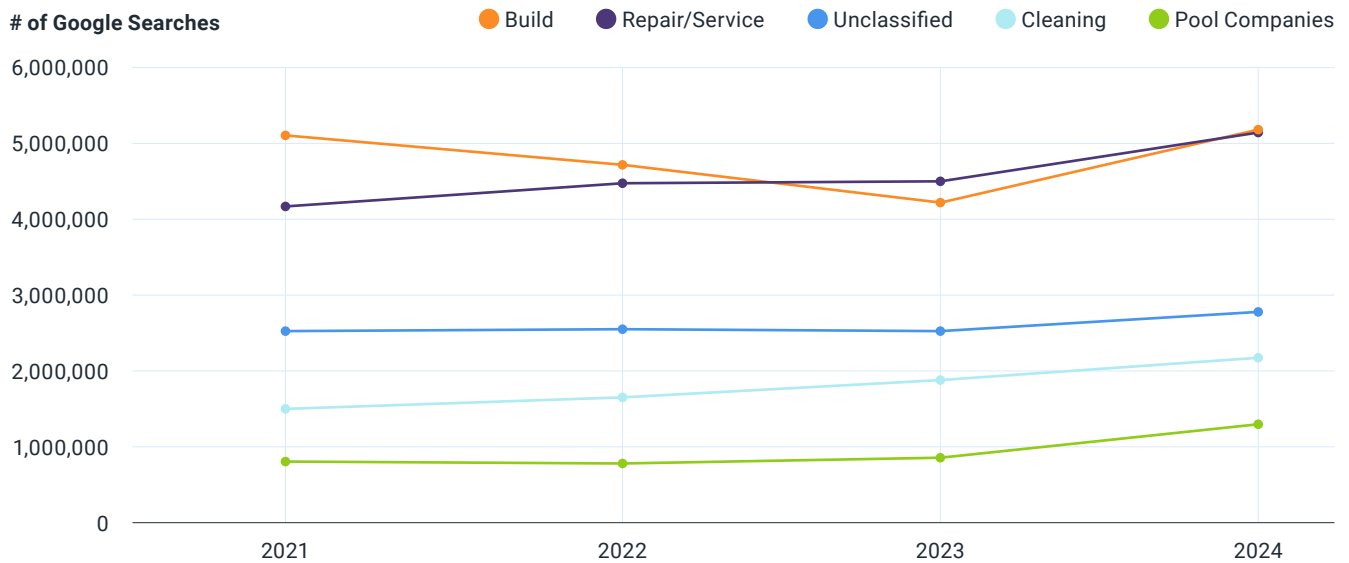
Industry challenges

- Increasing price-based competition
- Increasing automation
- Increasing chemical costs

¹ "Swimming Pool Cleaning Services in the US,"
IBISWorld Industry Report OD4832, October 2024.



Google Search Data Trends 2021-2024



Google search data from the past year backs up this assessment. Consumer searches for terms like “build,” “cleaning,” “pool companies,” and “repair/service” are up across the board, reaching even higher levels than we saw during the COVID-19 pandemic. While search trends aren’t perfect, they do provide good insight into consumer behavior and how it evolves year over year.

According to IBISWorld, there are a few challenges also expected to impact the market over the next year. For instance, the industry is seeing an influx of robotic cleaners, which are a double-edged sword for pool pros. On the one hand, they can help improve efficiency. However, they have also led to more homeowners opting for DIY maintenance. To combat this, pros need to double down on marketing their expertise to homeowners in realms like water chemistry and maintenance for long-term pool health. They also need to focus on providing superior customer

service to maintain healthy relationships with homeowners.

Additionally, chemical costs remain high, and we’re seeing increased price-based competition in the market. While pool pros can use price increases to offset the cost of chemicals and materials, they need to be cognizant of the low barrier to entry into the market and work to stay competitive in their region. That being said, providing a strong customer experience with good communication both pre- and post-service, easy billing, and superior results can help companies stand out from the competition.

More than anything, our data points to a market that is growing up and becoming an increasingly strategic space. This increasing maturity will introduce both opportunities and challenges for pool service providers over the next 12 months.



CHAPTER 1

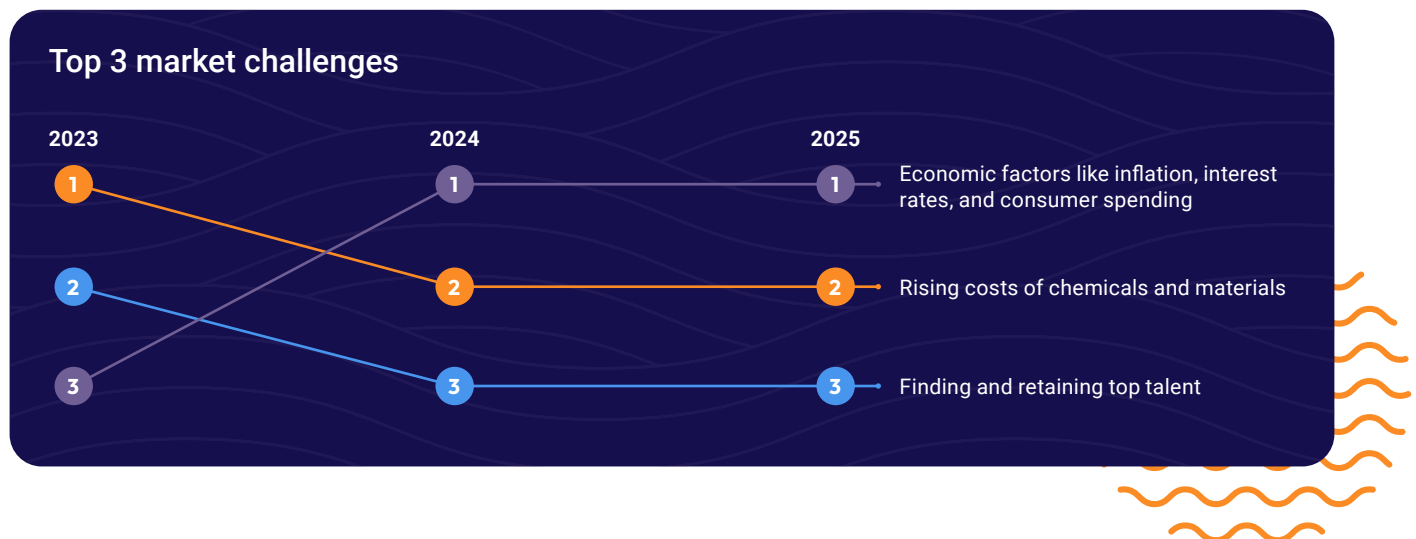
The economy was the top challenge for pool pros in 2024, and this trend is expected to continue in 2025

Chapter 1

Costs remained top of mind for pool pros through 2024.

However, while last year's survey respondents specifically cited the cost of chemicals and materials as the greatest challenge for their businesses, economic factors like inflation, interest rates, and consumer spending were ranked as having the greatest impact on business performance in 2024.

Pool pros expect this to continue over the next 12 months, with the economy being cited as the most influential factor, closely followed by rising costs and hiring and retaining talent.



The concern over costs—specifically of chlorine— has been driven by several factors:

- 1. Supply chain disruptions:** Events like the fires at BioLab's Louisiana plant in 2020 and 2024 disrupted the supply of chlorine and have created long-term supply shortages that increased prices.²
- 2. Pandemic-driven demand surge:** During the COVID-19 pandemic, there was a sharp rise in backyard pool installations as people invested in at-home entertainment. This created a significant demand for pool chemicals, exacerbating the supply-demand imbalance.
- 3. Inflation and rising costs:** Inflation has increased production and transportation costs, as well as the cost of packaging material, which has increased the expenses associated with manufacturing and distributing pool chemicals.

² "The Pandemic Is Over, So Why Are Chlorine Prices Still So High?"
Pool Magazine, November 5, 2024.

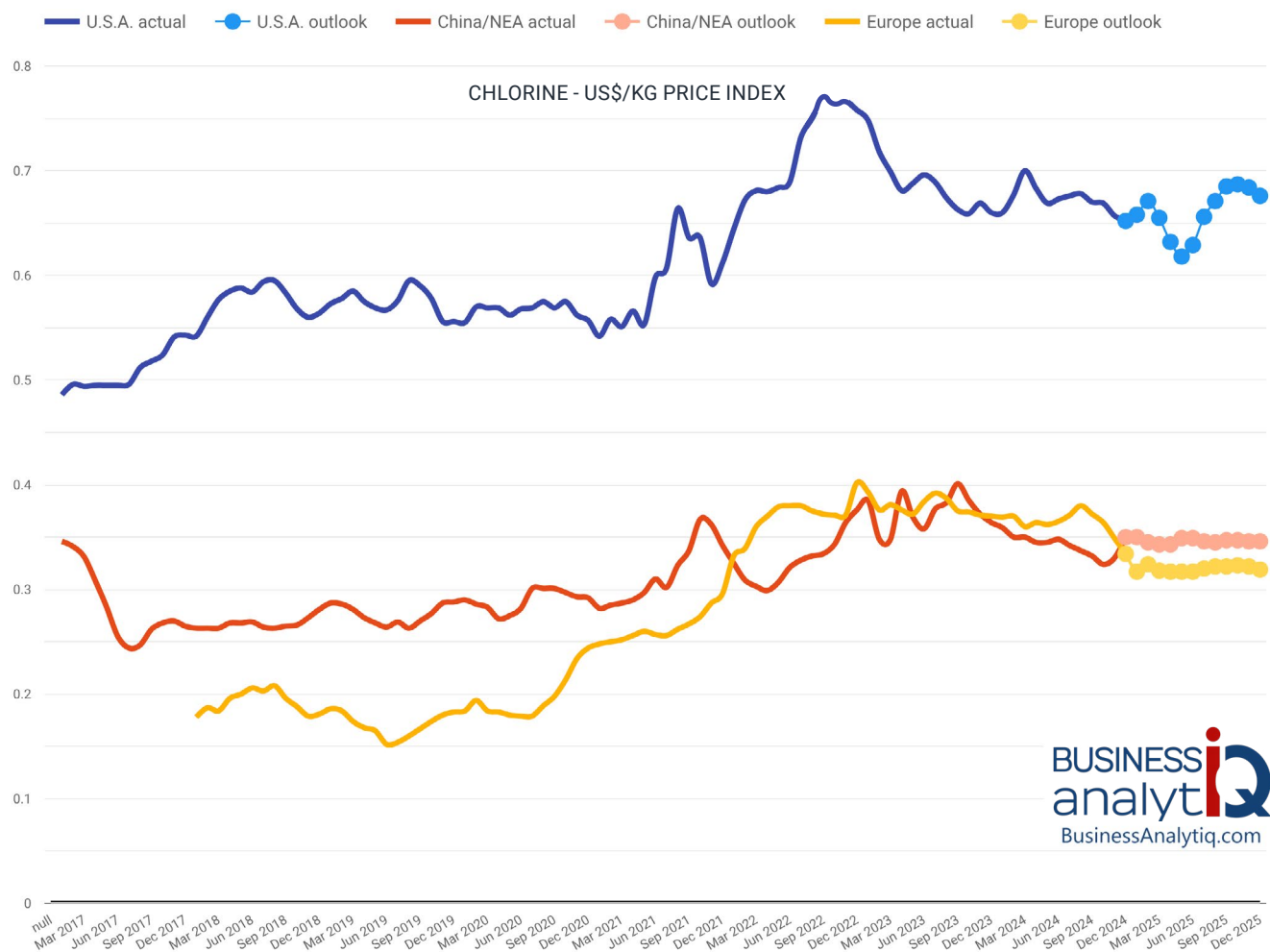
4. Labor shortages: The chemical production industry has faced labor shortages, slowing production and raising costs. Combined with high demand, this has sustained elevated prices.

5. Market consolidation: The limited number of chlorine producers worldwide leaves little flexibility to handle sudden demand spikes or production issues. This lack of competition has compounded the challenge of stabilizing prices.³

6. Potential tariffs: A big topic of conversation in pool pro networks is the potential impact of tariffs on already-high chemical and material prices. While this is conjecture at this point in time, many pros aren't ruling out the possibility of additional price hikes over the coming months.

Although chlorine prices have declined slightly from their peak in 2022, they remain roughly 20% higher than pre-pandemic levels.⁴ This suggests that the market is still struggling with a mix of legacy pandemic effects, supply chain issues, and macroeconomic pressures that we expect to see continue through 2025.

Historical Chlorine Price Index⁵



³ "Chlorine Market," PS Market Research.
⁴ "The Pandemic Is Over, So Why Are Chlorine Prices Still So High?" Pool Magazine, November 5, 2024.

⁵ "Chlorine Price Index," Business Analytiq.

CHAPTER 2

Pool pros are optimistic about 2025 and will continue to leverage moderate price increases to stay ahead of rising costs

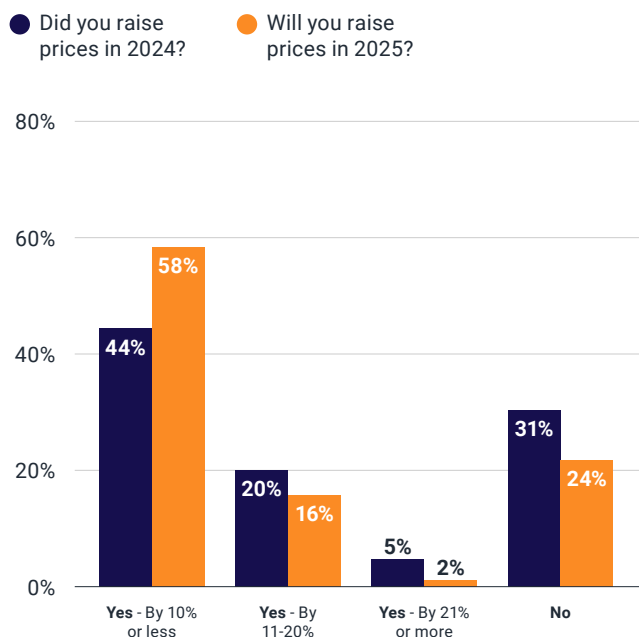
Chapter 2

Despite macroeconomic pressure, pool service company owners are not ones to fold to challenging economic times.

Over the next 12 months, pool service businesses will raise prices for cleaning, maintenance, openings, and closings to keep pace with rising material costs.

Owners will have to find the “sweet spot” on pricing to avoid putting undue price pressure on customers.

Price Increases in 2024 vs 2025



SIDEBAR

Price increase resources from Skimmer

Skimmer offers a number of free, useful resources for pool pros. If you're considering raising prices, check out the resources below:

- [WEBINAR] Strategies for Increasing Revenue Without Adding More Pools:** Access the webinar via [this YouTube link](#). You can also [read the blog recap of this webinar here](#).
- Service Rate Index:** A tool to benchmark your service pricing with others in your region. Learn more here: [Skimmer's Service Rate Index](#).
- Skimmer's price increase toolkit:**
 - [WEBINAR] How To Raise Prices (And Increase Profits):** Start here for pricing strategies and guidance for using the Price Increase and Profit Calculator.
 - Price Increase & Profit Calculator - Google Sheets**
 - Communicating Your Price Increase
 - [Price Increase Template #1](#)
 - [Price Increase Template #2](#)



Overall, the survey responses reflect an optimistic outlook for the pool service industry— although this is tempered by more realistic expectations compared to the prior year. In last year’s survey, 82% of respondents anticipated increased revenue in 2024 compared to 2023. However, only 58% of participants maintained those same expectations, signaling a notable shift in sentiment.

This disparity could come from external economic pressures, such as inflation, labor shortages, or fluctuations in demand, which may have tempered earlier enthusiasm. It could also indicate a recalibration of expectations following a review of 2023’s actual performance and emerging trends.

Despite this adjustment, the broader sentiment remains positive, as 81% of respondents expect revenue growth heading into 2025. This continued optimism may be attributed to the industry’s adaptability, particularly through flexible pricing models that allow businesses to remain competitive and adjust to changing

market dynamics. By leveraging variable pricing, companies can cater to diverse customer needs and maintain steady cash flow, even in uncertain economic climates.

The low percentage of respondents (2.42%) expecting revenue declines further underscores the resilience of the pool service industry. With only a small minority anticipating stagnation or contraction, it’s evident that most businesses see growth as a reality in 2025. The 15.68% predicting stable revenues may represent cautious operators who prefer conservative forecasts or anticipate challenges balancing costs and market expansion.

The gap between last year’s expectations and this year’s reality may also highlight the unpredictability of external factors. While businesses initially had high hopes for sustained growth, unexpected market shifts or operational challenges might have tempered these expectations. This recalibration underscores the importance of agility to align business goals with evolving realities.



CHAPTER 3

Pool pros are getting more sophisticated in their growth strategies

Chapter 3

Pool pros are relatively split on their ultimate goal for 2025.

According to survey respondents, growing revenue just edges out growing net profits as the primary goal.

Pros may prioritize revenue growth over net profits due to several strategic and practical reasons. Revenue growth often signals business expansion and success, which can attract customers, investors, and employees. It also supports scaling by spreading fixed costs—such as equipment and labor—across a larger base and improving operational efficiency.

Additionally, revenue growth allows for reinvestment in the business—such as upgrading equipment, hiring staff, or adopting new technologies—which may reduce short-term profits but build a foundation for long-term success. Many businesses also focus on top-line growth to boost their valuation, as revenue is often a key metric for potential buyers or investors.

Primary business goal in 2025

Grow top line (Increase gross sales or revenue)	46%
Grow bottom line (Increase net profits)	45%
Sell the company	3%
Break-even	3%
Other	3%

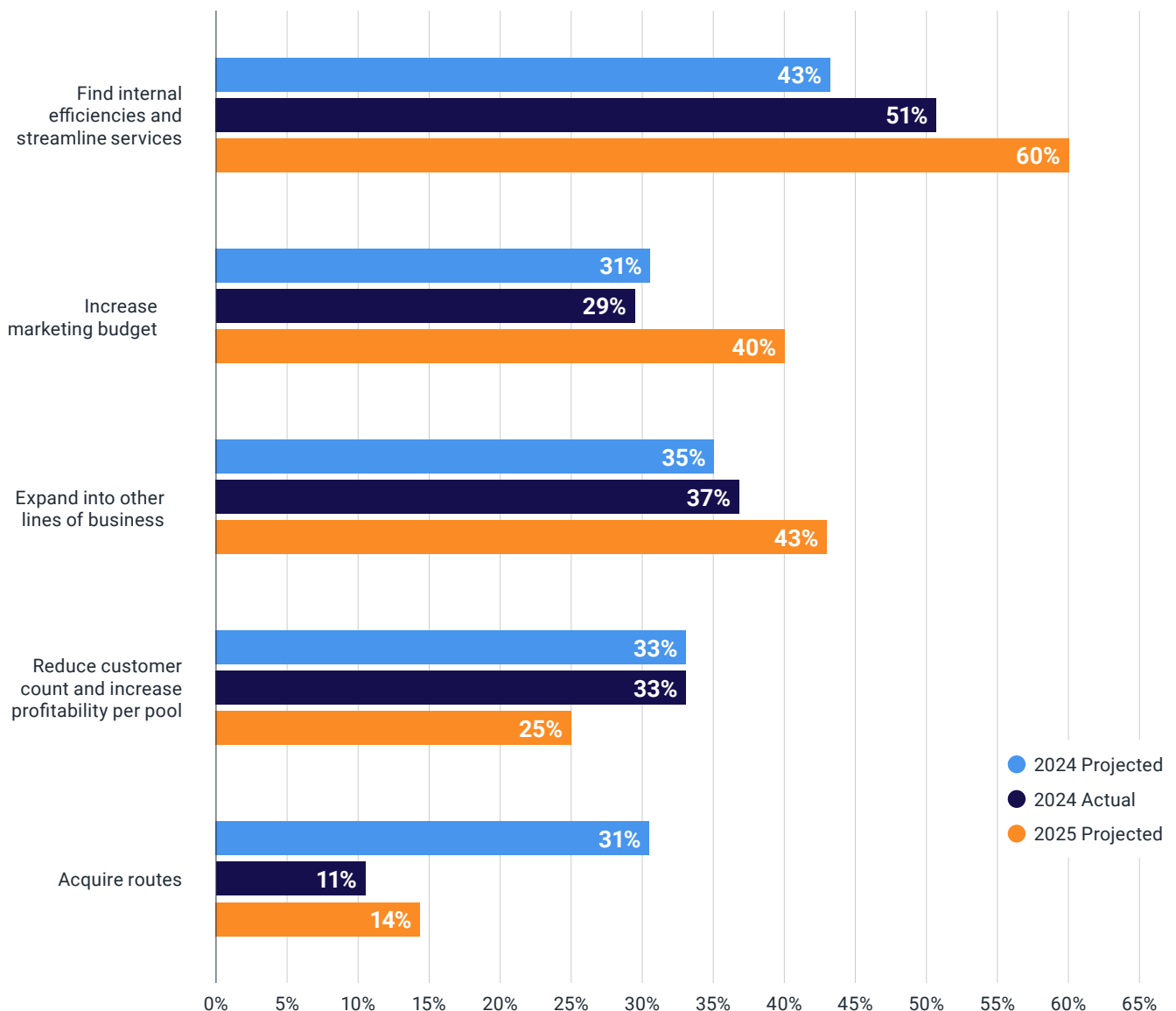


To achieve these goals, pros are turning to a range of strategies to grow their businesses. In last year's survey, respondents were very split on the strategies they would use to meet their growth goals. This can be at least partially attributed to an industry that is growing and maturing. We can also see the impact of challenges like the economy, rising costs, and labor shortages on how pros are thinking about

growth in 2025. There's a renewed focus on efficiency and maximizing profit per pool versus more aggressive growth tactics as pros look to build resilient businesses.

When asked again this year how they grew in 2024, respondents had more opinions and specific answers. These strategies and tactics will continue to be refined through 2025.

What strategies did you use to grow your business?



Diving into 2025's top growth strategies

1. Find internal efficiencies and streamline services

Pool pros are moving away from just packing on more business at all costs. 60% of survey respondents said that in 2025, they're planning to prioritize internal efficiencies to support profitability.

By improving operational efficiency, pool pros can reduce overhead while maintaining profitability despite inflationary pressures. Additionally, streamlining services by optimizing routes, using automation tools, or adopting efficient cleaning technologies can help pool businesses do more with fewer resources which is helpful in today's challenging labor market.

Improving efficiency is also core to meeting (or exceeding!) customer expectations. Customers increasingly expect fast, reliable, and tech-enabled services. Streamlining operations like scheduling, communication, and billing, can enhance customer satisfaction and retention.

Resources to help you find internal efficiencies and streamline services:

- [\[WEBINAR\] Seven operational habits of highly successful pool service companies](#)
- [\[WEBINAR\] From 0 to 1,000 pools in 365 days](#)

2. Expand into other lines of business

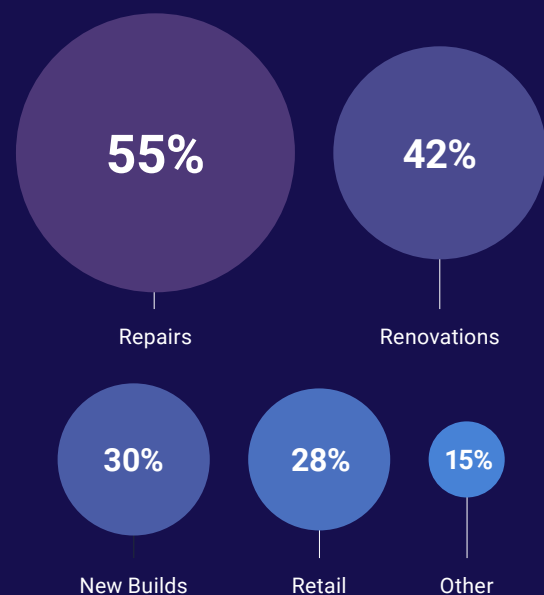
Expanding into other lines of business gives pool pros the opportunity to upsell into their existing customer base, as well as find new business.

Pool pros already have expertise, client bases, and industry knowledge, which can all help with expansion.

The most common line of business that pros are considering expanding into is repairs, followed by renovations, new builds, and retail.

The pros also cited leak detection, tile cleaning, landscaping, and automation as areas of interest for expansion.

What other lines of business are you expanding into?



3. Increased marketing budget

40% of survey respondents said a bigger marketing budget is on the table for 2025. This makes sense, given the relatively low barrier to entry in the pool service market. There are always new competitors for established companies to contend with, and marketing beyond just word of mouth will be increasingly important for pros to find new business.

Want to do more marketing in 2025? Check out [Marketing 101 for Pool Pros](#) from Skimmer and Pool Monopoly.

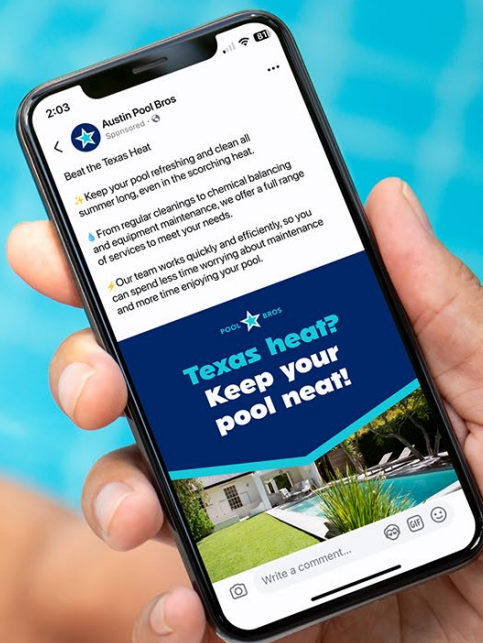
40%

of survey respondents
say a bigger marketing
budget is on the table
for 2025

4. Reduce customer count and increase profitability per pool

25% of respondents said that increasing profitability per pool was a 2025 priority. This involves strategies like price adjustments and increases, carefully monitoring and managing chemical spend, and having a daily view of expenses. Executing against this strategy requires good data at the per-pool level— this is essential to cut costs at the micro level in order to see impact on profitability.

If you want to start exploring this strategy, read our blog or [watch our webinar](#) on how to double profits and increase revenue without adding more pools.



5. Buy routes

Only 14% of survey respondents said they plan to grow through route acquisition. There are a few possible reasons that pros are favoring efficiency-based growth over more aggressive tactics like acquiring routes:

- a. Labor shortages:** Many pool service companies are struggling to find skilled labor, which limits their capacity to take on additional routes. This issue is compounded by high turnover rates in the industry.
- b. Inflated operational costs:** Rising costs for chemicals, fuel, and maintenance equipment have squeezed profit margins. Expanding routes can amplify these financial pressures unless higher service fees are guaranteed.
- c. Challenging economic conditions:** Persistent inflation and uncertain economic conditions might make pool pros wary of overextending their operations. They may prefer to focus on maintaining profitability rather than risking over-expansion.
- d. Client management concerns:** Managing more clients involves additional administrative work, potential for complaints, and logistical challenges. Pool pros may prioritize maintaining high service quality over increasing their client base.
- e. Market saturation:** In areas with high competition, acquiring new routes might not be seen as a profitable venture, especially if existing routes are already meeting financial targets.

These factors collectively influence the cautious approach pool professionals take toward expanding their routes.

For pros who are looking at route acquisition as a path to growth, Skimmer has [several resources to help you get started](#).

6. Sell routes

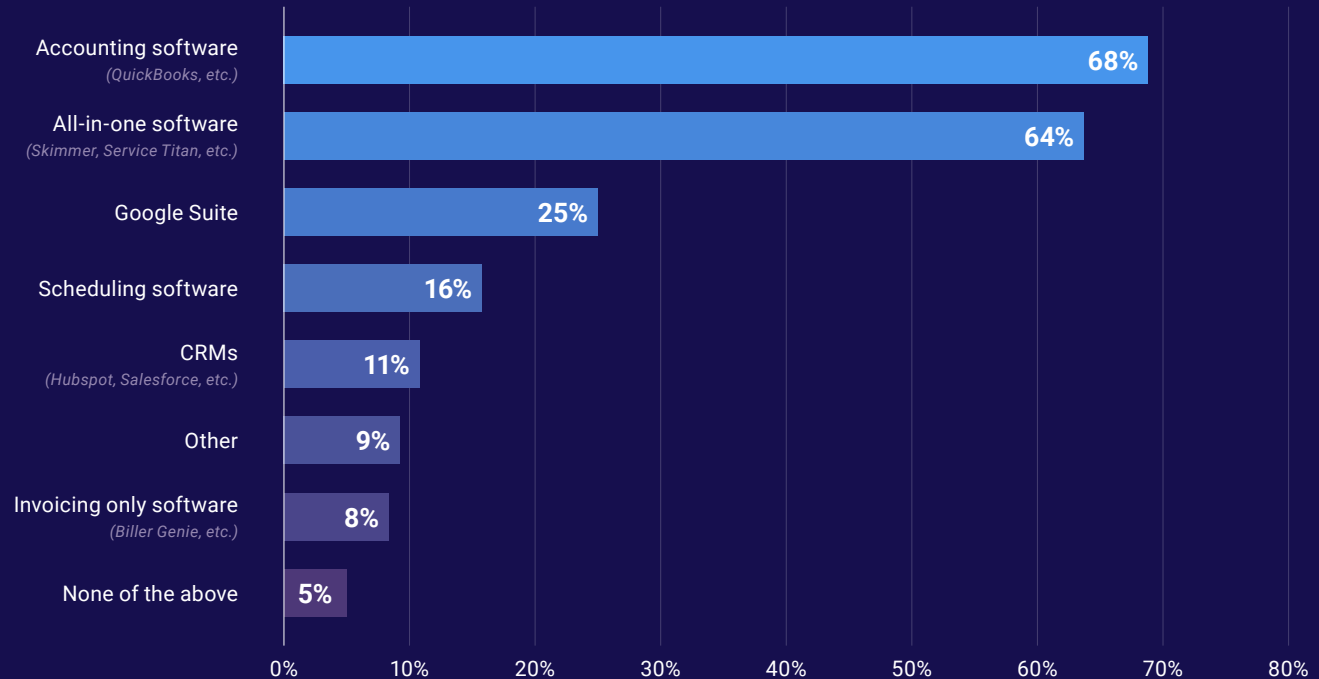
Only 4% of pros are planning on selling routes in 2025. This makes sense, given that established routes are the bread and butter of pool service, and selling can have a negative impact on cash flow. It can also impact valuation. The exception here may be pool pros who are looking to focus more, be it geographically or in terms of service, or those looking to sell their company entirely.



SPOTLIGHT

Software

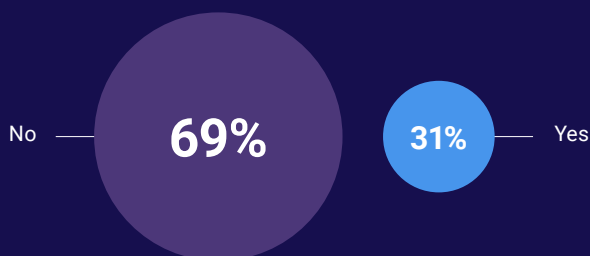
What software tools do you use to help manage & operate your business?



Most pool pros use software to run their businesses, with accounting software and all-in-one solutions like Skimmer being the two most popular solutions.

Additionally, the percentage of budgets allocated to software and technology dropped from 12% in 2023 to just 8% in 2024. This could be due to a number of factors:

Do you plan to purchase software in 2025?



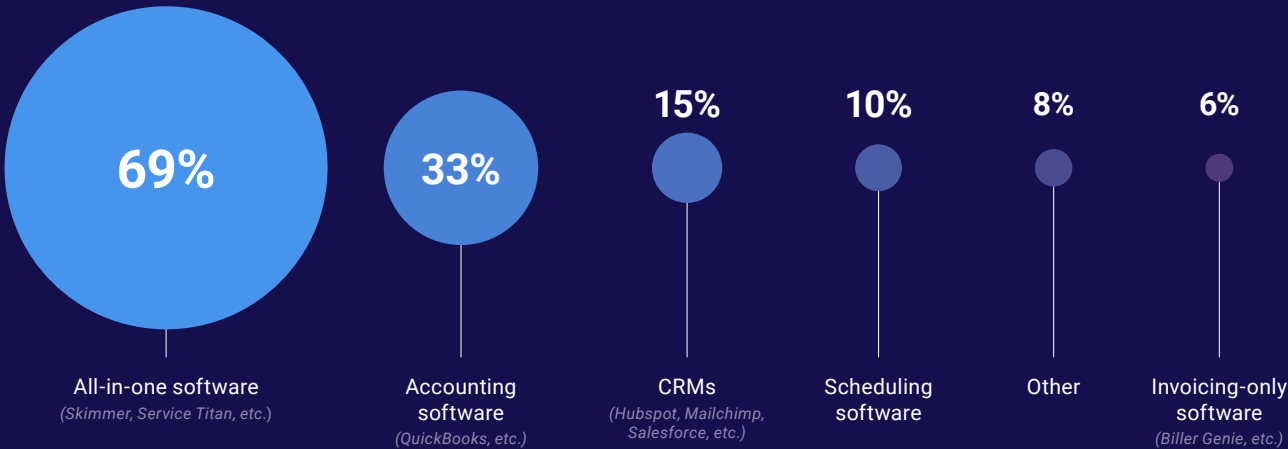
However, the way pool pros buy software has shifted over the past year. Only 31% of survey respondents reported that they plan to purchase software in 2025.

- **Adoption of subscription models:** Subscription-based pricing often spreads costs over time, leading to smaller annual allocations compared to upfront purchases.
- **Inflationary costs elsewhere:** Rising costs for labor, chemicals, fuel, and other operational expenses could force companies to reallocate budgets away from software.
- **Economic uncertainty:** Companies may be prioritizing core operational expenses over technology investments during periods of economic instability or reduced service demand.

SPOTLIGHT

- **Automation and AI:** Advanced software might now require less user input and fewer resources to operate, lowering its cost relative to overall operations.
- **Optimization:** Companies may have streamlined their software usage, focusing on maximizing efficiency from fewer tools.
- **Emerging alternatives:** Freemium tools or lower-cost apps for scheduling, invoicing, and CRM functions might be replacing more expensive, specialized software solutions.
- **Focus on growth or expansion:** Companies might be directing funds to marketing, equipment, or hiring rather than software.
- **Shift in operational models:** Smaller businesses or startups in the industry may allocate less to software as they focus on establishing basic operations.
- **Consolidation of providers:** Pool service companies consolidating tools into fewer platforms (e.g., an all-in-one solution) might reduce overall software expenditures.
- **Technological hesitancy:** Some companies, especially smaller ones, may be slow to adopt new technologies or reluctant to upgrade existing software.
- **Underutilization:** If businesses feel they're not using their current software to its fullest, they may be hesitant to allocate more budget toward it.
- **Advancements in general-purpose software:** With tools like Google Workspace and Microsoft 365 offering robust integrations, companies might rely on these for a significant portion of their needs.

Of those survey respondents who indicated that they are planning on making a software purchase in 2025, the vast majority (69%) said they would be investing in an all-in-one solution.



CHAPTER 4

The influx of private equity in the market is generating mixed reactions

Chapter 4

Private equity is not a new concept in the pool and spa service sector. Over the past few decades, we've seen more and more private equity enter the market. But, in the past few years, the pool and spa services industry has experienced a significant influx of private equity investment, leading to increased consolidation and expansion within the sector.

Consolidation and expansion

Private equity firms have been actively acquiring pool service companies⁶ to create larger, more efficient entities. For instance, in July 2024, O2 Investment Partners formed a new pool care platform by merging five prominent firms in New York and New Jersey: Aqua Doctor, Chaikin Ultimate Pools, Cool Pool & Spa, Gorlin Pools and Spas, and Rainbow Pools. This consolidation aims to provide a comprehensive suite of services, including pool maintenance, repair, upgrades, renovations, and construction.⁷

Similarly, in June 2024, Easton Select Group, a Massachusetts-based company, announced its growth and expansion strategy in the pool services sector. The firm aims to expand its market presence and distribution network for its patented plunge pools, indicating a strategic move to capitalize on the growing demand in the industry.⁸

Strategic partnerships

Private equity firms are also forming strategic partnerships with established pool service companies to drive growth. For example, in 2022, Generational Equity, a leading mergers and acquisitions advisor for privately held businesses, announced the sale of its client, Naples Pool Service, Inc., to Pool Centurion Group.

"On the downside, private equity is buying market share through brute force, which is detrimental to customers. These equity-backed companies often acquire large swaths of customers and expand so rapidly that they can't provide adequate training or oversight. This results in poor service quality and communication, ultimately harming both customers and the industry. In some cases, these companies spend hundreds of millions of dollars and accept a significant amount of customer churn as part of their strategy. This approach not only degrades the customer experience but also undermines the industry's reputation. Compounding the issue, Florida already ranks among the lowest in the country for service pricing, leaving little room for error or added value."

"On the positive side, however, the deeper pockets of these larger companies are helping to create a much-needed market shift. By setting higher price points for services and repairs, they're establishing a more equitable baseline in an industry that has long been underpriced. Additionally, the substantial capital required for their operations makes it more likely that a private equity-backed firm would consider purchasing my company when I'm ready to exit."



Thomas Diaz, President
365 Pool Service and Repairs

"We see [private equity] as a positive thing! Typically, the quality of service goes down after selling to a private equity firm. We hear this all the time in sales calls and end up having an opportunity to bring that client onboard."



Chancy Green, Vice President
Cool Pool People

⁶ "Consolidation Trend Takes Hold in Northeast as Five Prominent Firms Merge," *Pool & Spa News*, July 11, 2024.

⁷ "O2 Forms New Pool Services Platform," *Business Wire*, July 11, 2024.

⁸ "Easton Select Group Makes Strategic Investments," *PoolPro Magazine*, July 26, 2024



Long-term investment strategies

Unlike traditional private equity firms that may seek quick returns, some investors are adopting long-term strategies in the pool and spa services market. [MPD Pool Holdings](#), for example, emphasizes owning and nurturing acquired businesses for multiple decades. This approach focuses on sustainable growth and maintaining each company's unique identity within its portfolio.

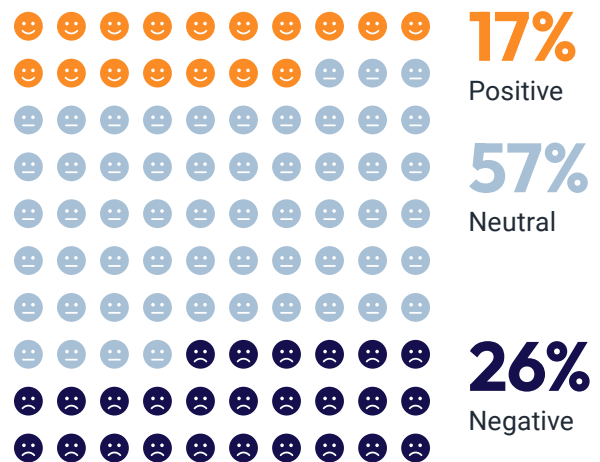
Market drivers

The increased interest from private equity is driven by several factors:

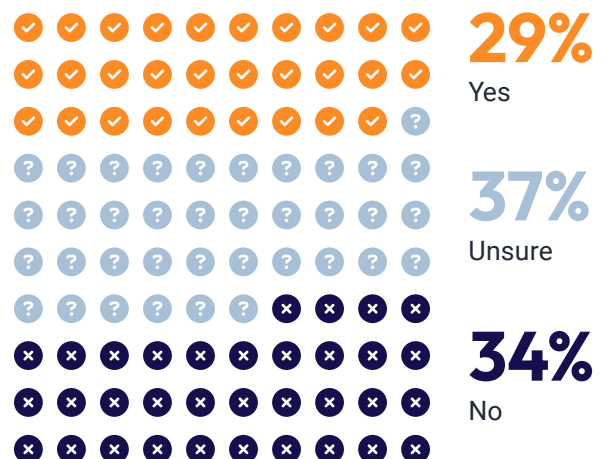
- **Growing demand:** The COVID-19 pandemic has heightened consumer interest in home leisure activities, including pool and spa installations and maintenance, making the industry more attractive to investors.⁹
- **Fragmented market:** The pool and spa services sector is highly fragmented, presenting opportunities for consolidation and the creation of more efficient, scalable operations.¹⁰
- **Recurring revenue:** Pool maintenance and repair services offer steady, recurring revenue streams, appealing to investors seeking stable returns.

Despite the prevalence of this kind of investment activity, pool pros themselves are split on what this means for the market.

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?



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



⁹ "Consolidation and the Pool & Spa Industry," *Pool & Spa News*, March 24, 2022

¹⁰ "Profitable Partnerships: The Pool & Spa Industry and Private Equity," *Pool & Spa News*, October 10, 2018

This influx of private equity investment may offer opportunities that business owners can capitalize on, particularly as investors focus on consolidating and growing businesses. Here's how they can take advantage:

1. Access to capital

Private equity firms often provide funding for expansion, modernization, and improved operational efficiency. For pool service businesses, this could mean:

- Upgrading equipment and technology.
- Expanding service offerings or geographic reach.
- Buying routes to increase market share.

Access to this capital can help businesses grow faster than they could on their own.

2. Operational expertise

Many private equity firms bring industry-specific knowledge and management expertise. This can help pool service business owners:

- Streamline operations and reduce costs.
- Implement best practices for customer service and marketing.
- Improve employee training and retention programs.

3. Increased valuation

When private equity firms consolidate smaller businesses into larger networks, individual businesses may see an increase in valuation. This is especially beneficial for owners considering an eventual sale, as they might receive higher offers than in a fragmented market.

4. Market stability

Consolidation driven by private equity can stabilize the industry by reducing competition and creating more standardized pricing. This can lead to more predictable revenue streams for pool service businesses, making them more resilient to economic fluctuations.

5. Partnership opportunities

Business owners who choose to partner with private equity investors rather than sell outright can retain partial ownership while benefiting from the resources and growth strategies provided by the private equity firm. This hybrid approach allows them to participate in future profits as the company grows.

Despite the many benefits, there are also challenges to consider when partnering with or being acquired by private equity firms:

1. Loss of autonomy

Business owners may lose decision-making power over their company's operations, culture, and direction. Private equity firms often impose strict operational guidelines or require changes to meet financial goals. Owners who are used to independent management may struggle with investor-driven decisions, such as cutting costs or prioritizing short-term profitability over long-term stability.

2. Cultural misalignment

Private equity firms may focus heavily on financial performance, potentially clashing with a company's established culture or customer service standards. This could alienate employees or loyal customers.

3. Pressure to meet financial targets

Private equity investors typically have high expectations for return on investment (ROI) and may set aggressive revenue or profit targets. Owners may face pressure to grow rapidly, potentially overextending resources or compromising service quality.

4. Focus on short-term gains

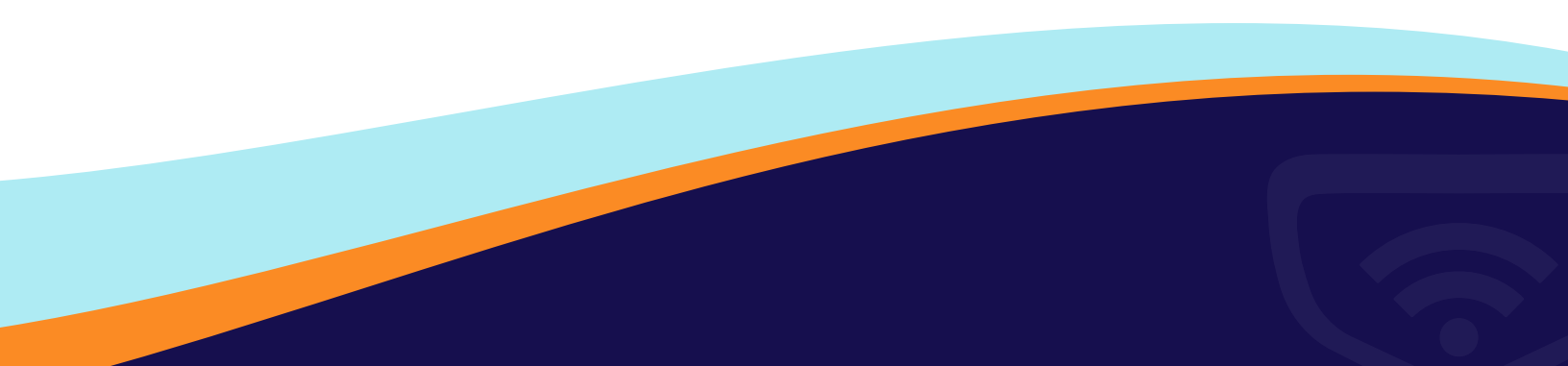
Some private equity firms focus on quick exits, aiming to sell the business for a profit within a few years. This can result in decisions that prioritize short-term gains over sustainable growth.

5. Potential employee disruption

Consolidation and restructuring can lead to layoffs or changes in management, which may affect employee morale and stability. Employees accustomed to a family-run business environment might struggle to adapt to the more corporate culture often associated with private equity ownership.

6. Legal and financial risks

Entering into a partnership or acquisition agreement with a private equity firm requires careful negotiation. Poorly structured deals can result in unfavorable terms for the business owner. Without proper legal guidance, an owner might unintentionally give up more equity or control than anticipated, limiting future opportunities.



How to mitigate these challenges

To address these potential downsides, business owners should:

- Perform due diligence on the private equity firm, including their track record with other businesses.
- Seek legal and financial advice to negotiate favorable terms.
- Set clear expectations for the partnership, including operational control and long-term goals.
- Communicate transparently with employees and customers about changes to ensure continued trust and loyalty.

By carefully evaluating and planning for these challenges, pool service business owners can make more informed decisions about engaging with private equity investors.



CHAPTER 5

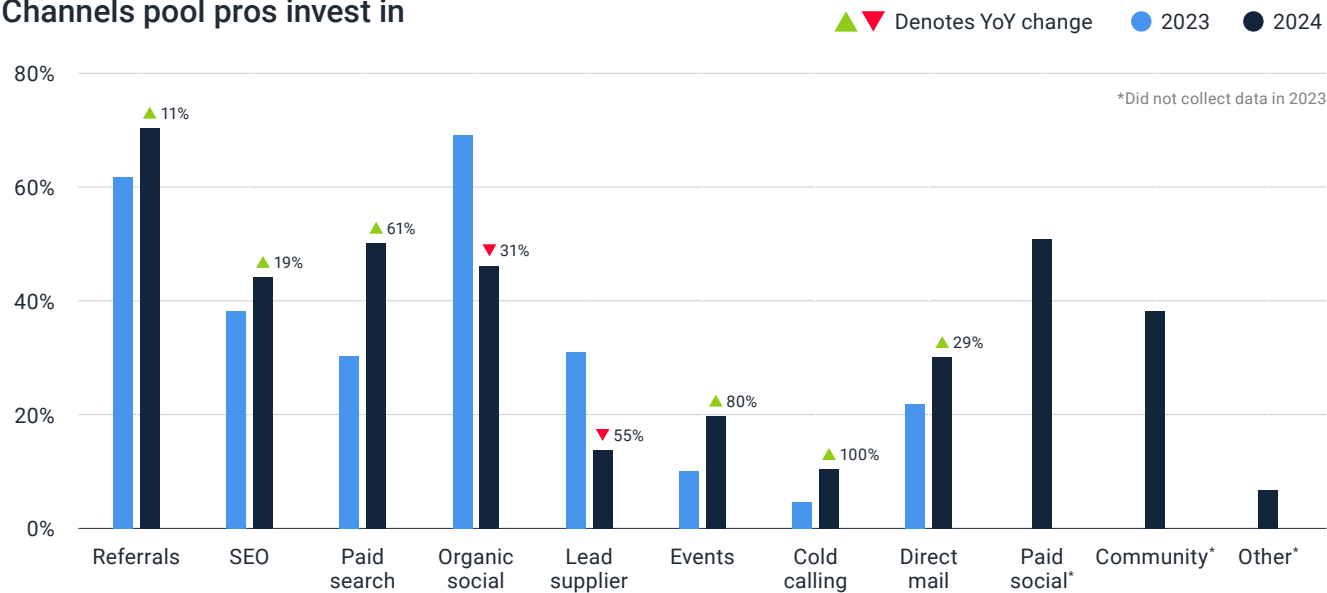
The industry marketing landscape has shifted considerably over the past 12 months

Chapter 5

One area of the pool and spa service market that has seen a big jump forward since last year is the strategies and tactics that pool pros are using to market their businesses. While more pros reported doing paid marketing this year, there’s still a lot of room for growth.

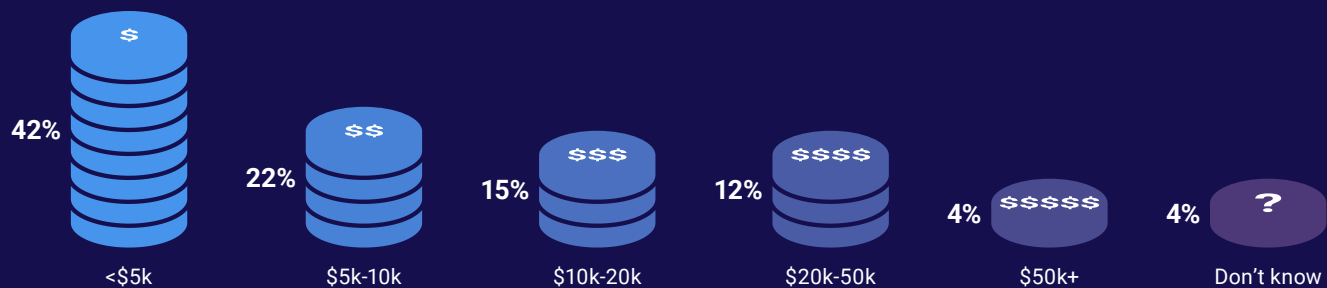
That being said, survey respondents reported a significant uptick in marketing activity across the board. We asked survey respondents what channels they invested in in 2024, and nearly all channels saw an increase, with the exception of organic social and lead suppliers.

Channels pool pros invest in



With over 42% of respondents reporting a marketing budget of \$5000 or less, the decreased reliance on lead suppliers makes sense. These services are often expensive and can deliver mixed results. In an industry with a low barrier to entry and relatively high competition, it’s a risk that many pool pros aren’t willing to take.

Pool pros’ annual marketing budget



Challenges with lead suppliers for pool pros

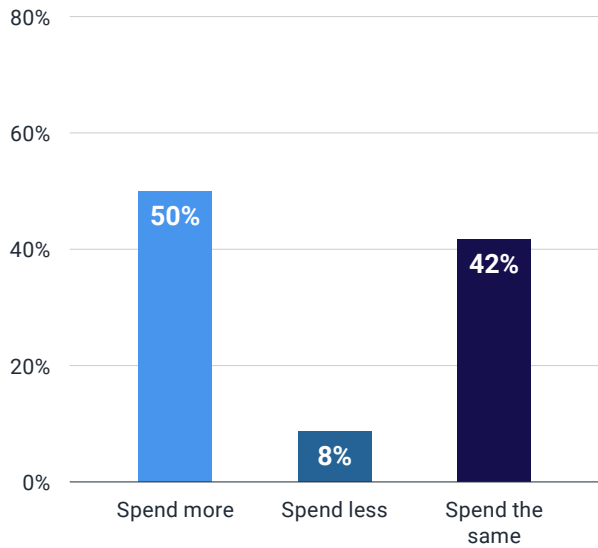
- 1. Lead quality vs. quantity:** Many lead suppliers focus on generating a high volume of leads, but the quality can vary greatly. Often, leads may not align well with your target audience, resulting in wasted time and resources chasing prospects unlikely to convert.¹¹
- 2. Shared leads:** Many lead suppliers sell the same leads to multiple companies, increasing competition. This forces businesses to compete heavily on price or response time, which can erode profit margins and strain operations.¹²
- 3. Cost and ROI concerns:** The cost of purchasing leads can be high, and if those leads do not convert, the return on investment diminishes quickly.
- 4. Dependency risk:** Over-reliance on external lead suppliers can prevent companies from developing their own marketing strategies. This dependency reduces long-term sustainability and growth as you miss opportunities to build customer loyalty and brand recognition directly.

In this year's survey responses, we're seeing an increase in strategies like paid search, events, cold calling, and direct mail. The latter three point to a focus on real human connection as a way for pool pros to generate business from their communities.

Marketing channels with the best quality leads ranked



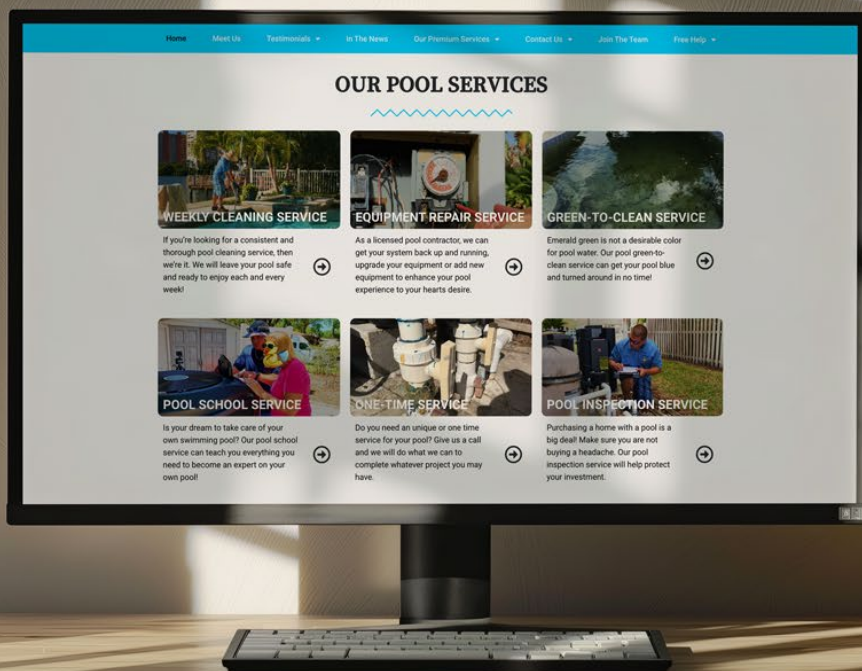
In 2025, how do you plan to spend on marketing?



Last year's respondents were split on future marketing budgets—45% reported they planned to spend more on marketing in 2024, and 45% expected their marketing budgets to decrease from 2023 numbers. This year, however, over 50% of respondents report that they're planning to spend more on marketing in 2025, with 42% planning to keep their budgets at 2024 levels. Only 8% of respondents plan to decrease marketing spending in 2025.

50%

of respondents plan to spend more on marketing in 2025

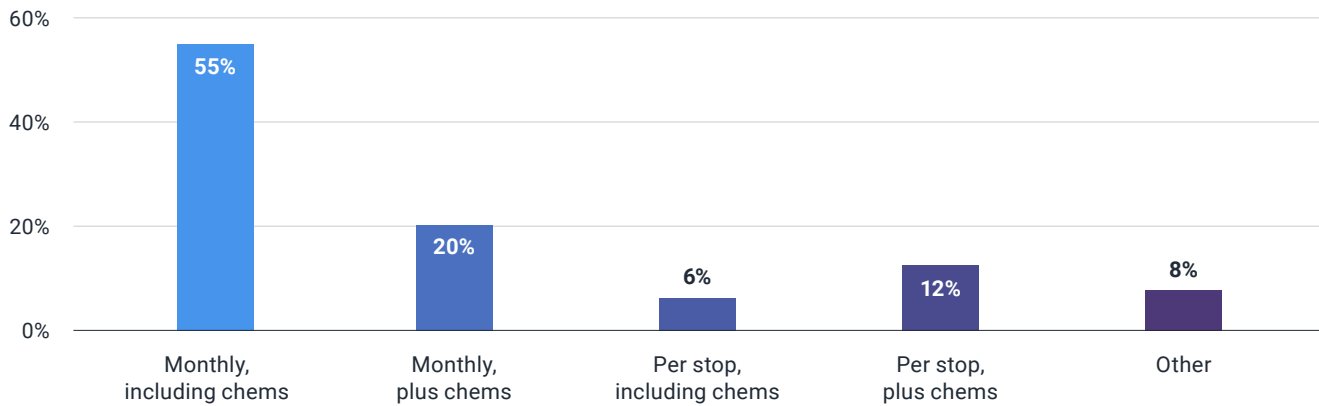


CHAPTER 6

**Despite price volatility,
pros have been slow
to adopt a plus chems
pricing model**

Chapter 6

How pros bill for pool service



As we've noted previously, a plus chems pricing model is a great way for pool pros to charge for their services, as it allows them to easily account for changes in chem costs. However, according to survey data, over 54% of respondents are using a monthly including chems model. Only 20% are using monthly plus chems, while very few respondents are charging per stop.

We expect that there are a few different reasons that pros are leaning towards including chems in pricing:

1. Simplified pricing for customers

A flat fee that includes chemicals makes pricing more predictable and eliminates surprises for customers. This can improve customer satisfaction and build trust. It also makes billing more simple since pros don't have to worry about separate billing or monitoring chemical usage. Everything is taken care of in one package.



"We like to treat our clients the way we would like to be treated. No-nonsense pricing. In business, there is always a risk and you can either choose to put that risk on the client or your own business. We choose to take the risk off of our clients. It forces our entire team to become better and more mindful of their craft."



Chancy Green, Vice President
Cool Pool People

"It would be very hard to get most of my customers to accept anything less than all-inclusive. They like the predictability of the same amount each month, they can schedule the bill every month and not think about it."



Thomas Walsh, Owner
Integrity Pool Service

2. Competitive differentiation

Offering all-inclusive services can make a company stand out in the market and attract customers who value simplicity. Bundling chemicals into the price may make customers feel like they're getting more value for their money.

3. Streamlined operations

Including chemicals in the base price simplifies invoicing and reduces the administrative work involved in tracking and billing for chemicals separately. Pre-determined pricing allows the company to plan chemical purchases in bulk, which may lower costs and improve operational efficiency.

4. Risk management

When chemicals are included, the company has more control over water quality and can ensure proper maintenance without relying on customers to approve additional costs. Customers are less likely to argue about extra charges for chemicals if they're included in the base fee.

5. Customer loyalty

Many pool owners prefer a consistent monthly fee instead of worrying about variable charges for chemicals. This can encourage longer-term service contracts. Customers often appreciate not feeling "nickel and dimed" with add-on charges.

All that being said, there are some significant risks to relying solely on a pricing model that includes chems, notably:

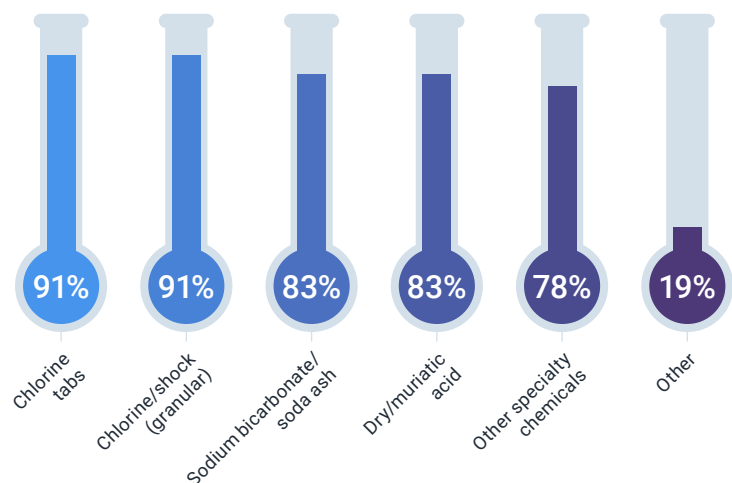
- **Higher base price:** The all-inclusive model might appear more expensive up front, which could deter some price-sensitive customers.
- **Unpredictable costs for the company:** Chemical needs can vary seasonally or due to customer behavior, potentially increasing the company's costs without additional revenue.

While a plus-chems pricing model can be more complex, technology like Skimmer makes it much easier to manage. Pros need to consider more flexible pricing strategies if they're going to continue staying ahead of price volatility.

Average service price

\$216	Routine cleaning (Avg. price/month)
\$104	Filter cleaning
\$229	Pool opening
\$331	Pool closing
\$63	Salt cell cleaning
\$123	UV system/heater preventive maintenance

Chemicals pool pros charge for

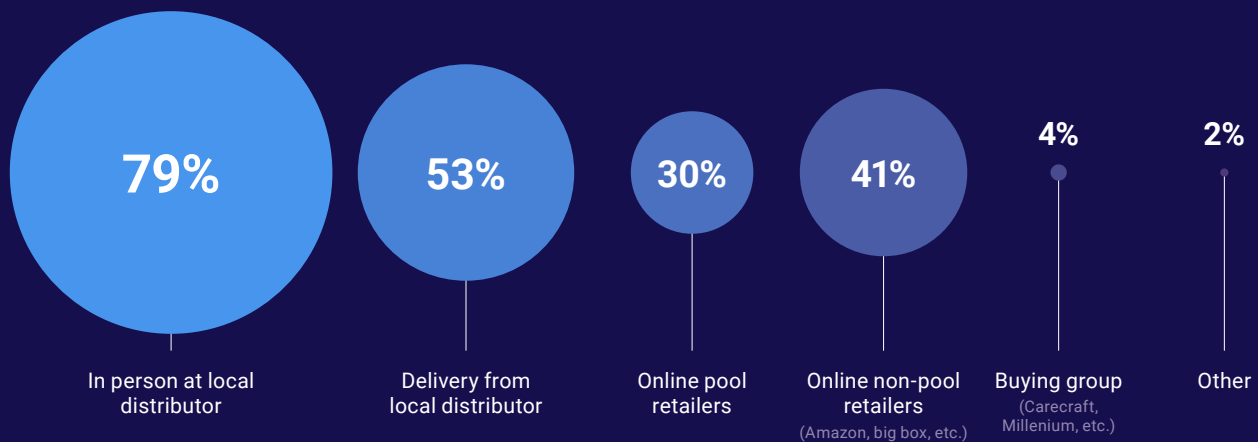


SPOTLIGHT

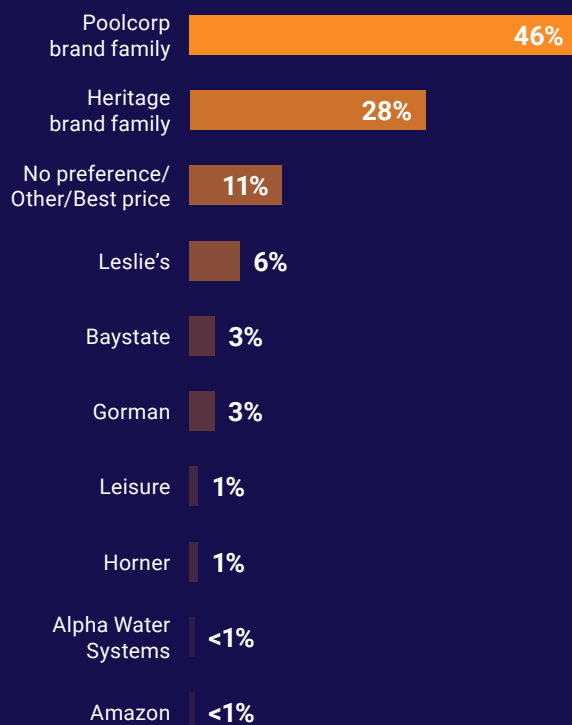
Pool Supply

We asked survey respondents about their preferences when it comes to stores, brands, and how they buy supplies. Here's what they said.

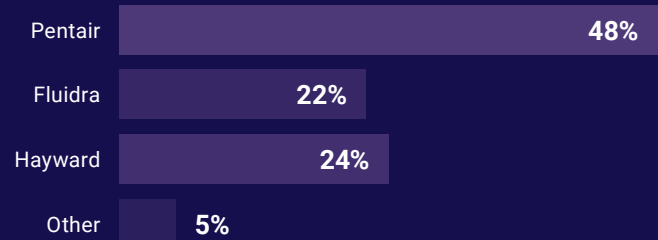
Where do you purchase parts and supplies?



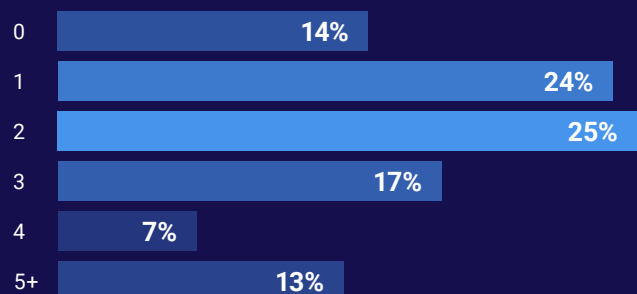
What is your preferred pool supply store?



What is your preferred equipment brand?



How many times do you visit your local distributor/week?



SPOTLIGHT

Labor

A few interesting hiring and labor trends came out of this year's survey data.

Office staffing

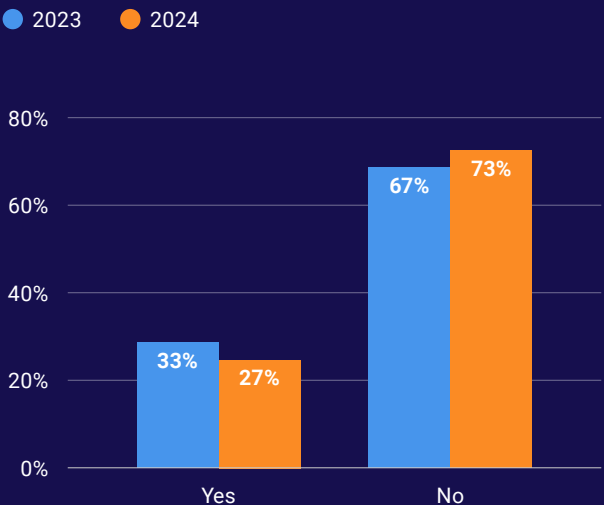
Many pool service businesses operate with minimal full-time office staff. In 2023, 58% of respondents reported having 0–1 full-time office employees, which slightly increased to 62% in 2024. That being said, there was an uptick in businesses with larger office teams, as those with 10–20 full-time employees grew from 4% in 2023 to 7.19% in 2024.

This shift might indicate an expansion among mid-to-large players in the industry or an increase in operational demands for some businesses.

How many full time office employees does your company have?



During peak season do you hire contract labor?



Seasonal and contract labor

The use of contract labor during peak seasons declined from 33% in 2023 to 27% in 2024. This reduction could reflect several factors, such as improved efficiency among existing staff, slower business growth in certain markets, or increased challenges in finding reliable contract labor.

The decline also points to a potential industry trend toward stabilizing operations year-round rather than heavily scaling up during peak times. This makes sense, especially given the concentration of pool service businesses in the Sun Belt.

SPOTLIGHT

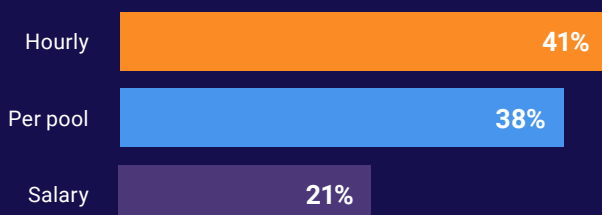
Future hiring

Looking forward, hiring in the pool service market shows a cautiously optimistic outlook. In 2023, 52% of businesses planned to expand their full-time workforce, with less than 1% intending to reduce it and 47% aiming to maintain current levels. By 2024, intentions to hire more staff in 2025 rose slightly to 55%, while those planning to keep staffing levels steady accounted for 44%. The proportion of businesses anticipating staff reductions grew modestly, from under 1% in 2023 to just under 2% in 2024.

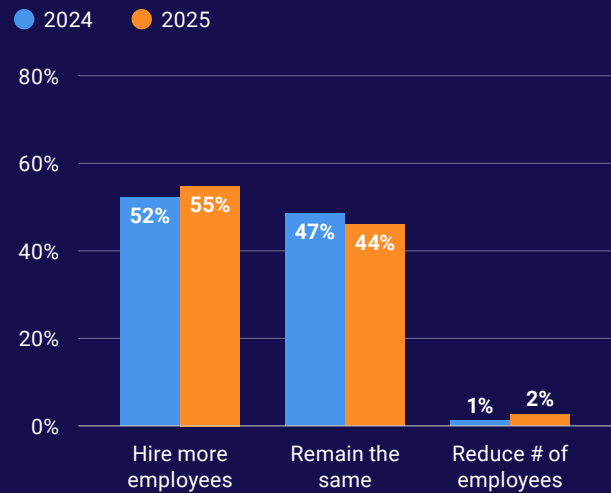
These changes suggest that while the majority of businesses are experiencing stability or moderate growth, there may be economic pressures or structural challenges prompting cautious hiring plans for a small subset of companies.

Overall, this points towards a continued reliance on small, efficient office teams and a move away from seasonal contract labor. The growth in businesses with larger office teams and the slight increase in hiring intentions could point to potential growth opportunities for the industry. However, the modest rise in those planning to reduce staffing reflects underlying uncertainties that some businesses may be navigating.

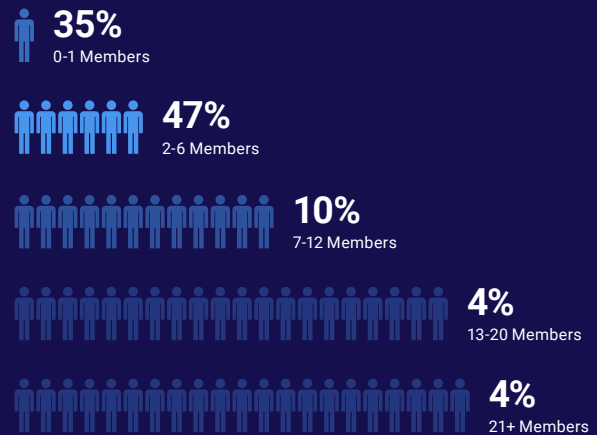
How do you pay technicians?



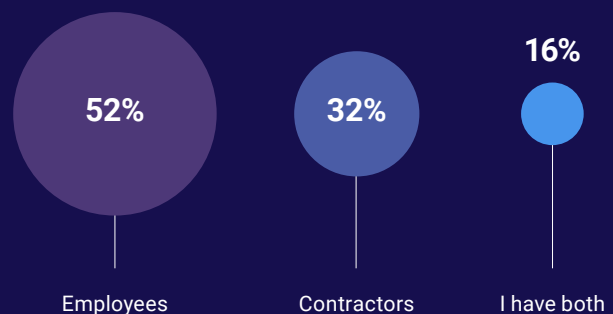
Hiring plan 2024 vs. 2025



How many crew members does your company have (techs, etc.)?



Are your technicians contractors (1099) or employees (W2)?



LOOKING FORWARD

Thriving in an evolving market

Looking forward

As we look ahead to 2025, it's clear that the pool industry is entering a phase of maturation and steady growth.

While macroeconomic challenges, price volatility, and shifts in market dynamics have tested the resilience of pool service professionals, the industry as a whole remains strong and full of opportunity. With the right strategies, pool pros can not only navigate this evolving landscape but thrive within it.

Embrace technology as a growth driver

One of the most significant changes shaping the industry is the increasing role of technology. From automated scheduling software to advanced water chemistry monitoring tools, technology is transforming how pool professionals deliver services, manage operations, and connect with customers. Businesses that adopt these tools can improve efficiency, reduce costs, and provide a better experience for their clients.

In the year ahead, investing in technology should be a top priority. Consider tools that streamline back-office tasks like billing and customer communication or solutions that enhance the on-site service experience, such as diagnostic apps, smart pool systems, and apps that support technicians in the field. Not only will these save time, but they'll also help you differentiate your services in a competitive market.

Seek out partners for long-term success

The pool industry's growing maturity has also heightened the importance of working with vendors who prioritize long-term partnerships over short-term transactions. Reliable partners who offer consistent quality, fair pricing, and strong support can become critical allies in achieving your business goals.

Carefully evaluate the companies you choose to work with. Look for partners who share your commitment to customer satisfaction and can provide the resources, training, and tools you need to succeed. A vendor who invests in your success isn't just a supplier—they're a strategic asset.



Strategies for thriving in a changing landscape

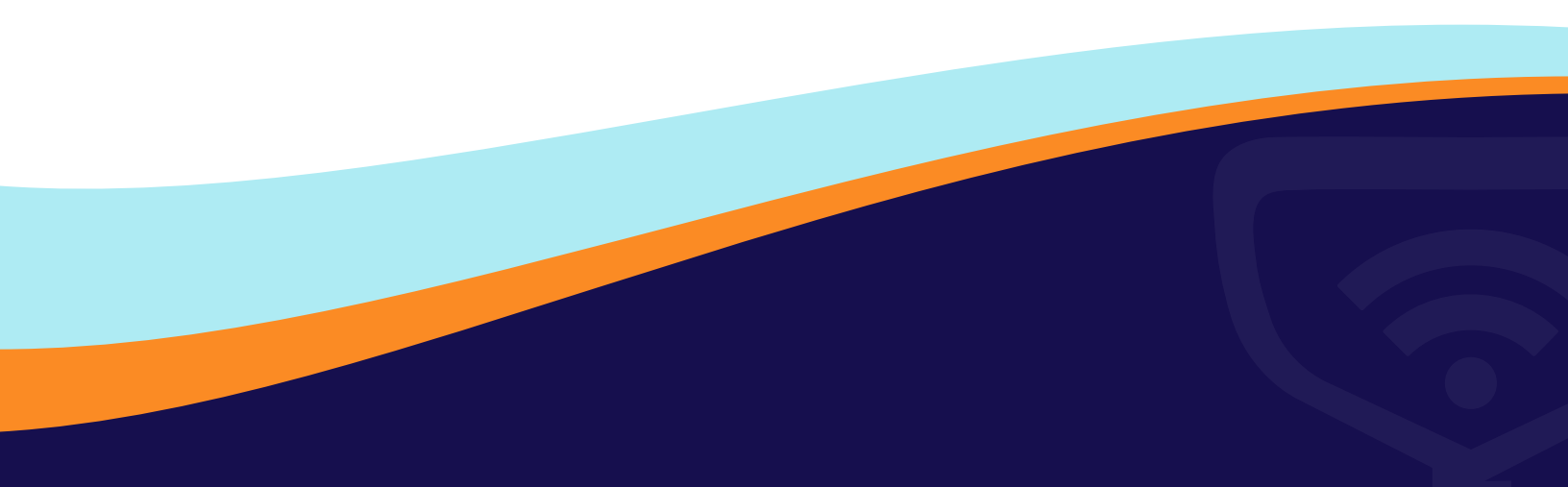
To make the most of the opportunities ahead, consider the following strategies:

- 1. Adopt a proactive pricing approach:** While price increases may be necessary to offset rising costs, transparency and communication with clients are key. Explain the value of your services and the benefits of any adjustments in advance.
- 2. Expand your skill set:** As the industry grows more sophisticated, so too must your approach. Attend training sessions, certifications, or workshops to stay ahead of emerging trends and techniques. Connect with other pool pros to share insights and tips and help each other grow.
- 3. Focus on customer experience:** In a maturing market, client relationships are your greatest strength. Regular communication, personalized service, and quick issue resolution will help you retain loyal customers and attract new ones.

A market full of possibilities

The pool industry in 2025 will be defined by its ability to adapt and innovate. With a focus on leveraging technology, building strong partnerships, and continuously refining strategies, pool professionals are well-positioned to excel in this maturing market. While challenges will persist, the opportunities for growth and success have never been greater.

Let 2025 be a year of progress—one where you embrace change, work smarter, have fun, and continue to deliver exceptional value to your customers.



Thanks to our partners

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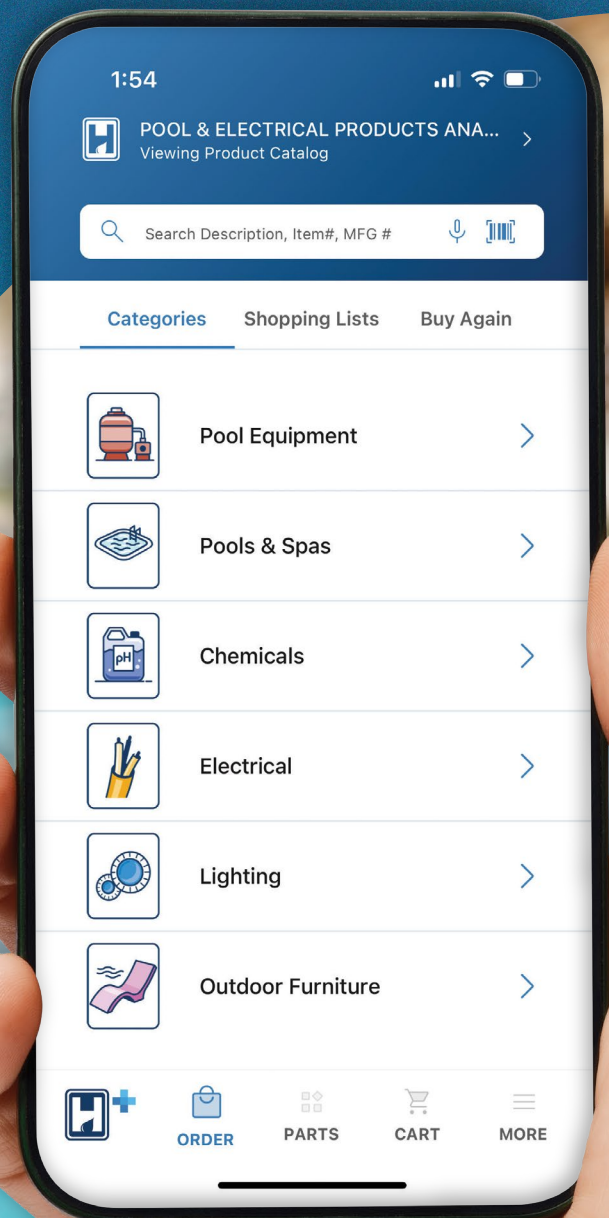
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