



2026 STATE OF THE INDUSTRY

ABOUT THIS REPORT

Now in its fourth year, the C&R State of the Industry Report, powered by KnowHow, remains the restoration industry's most comprehensive annual benchmark built by restorers, for restorers. This year's report is based on survey data from a large pool of participants across the United States and Canada, representing a wide range of company sizes, revenue levels, and business models.

A few things are new this year. For the first time, this report reflects a full calendar year of data (2025) - a deliberate shift from previous editions, which captured only a partial year. We've also introduced a new chapter dedicated to Best in Class vendors, recognizing the tools, platforms, and partners restoration companies trust most. And where prior editions drew on three years of trend data, this year's report draws on four, giving us the longest and most reliable trend lines yet.

As always, this report was designed for ease of reference and use. Each chapter ends with discussion questions and action items to help your team turn data into decisions. We hope it serves as both a mirror and a roadmap for your business heading into 2026.



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Every year, thousands of contractors, owners, and industry leaders quietly shape the future of restoration by answering one simple survey: The 2026 State of the Industry Report, powered by KnowHow, is where those answers turn into real data, real benchmarks, and real leverage for the restoration industry.

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FROM THE AUTHORS



A year of reckoning and resolve...

If I had to describe 2025 in a single word, it would be clarifying.

Historically, this industry has operated with a kind of built-in buffer - storms would come, claims would flow, and the fundamentals of the business could absorb a lot of inefficiency. That buffer thinned considerably in 2025. Claim volume stayed stubbornly low, not because the industry was unlucky, but because the landscape underneath it shifted. Policyholder behavior changed. Higher deductibles and tightening coverage led homeowners to absorb smaller losses themselves, or simply go without filing. And the traditional CAT events that have historically helped reach revenue goals were largely absent in the ways restorers expected.

What stepped into that vacuum wasn't a single catastrophe, but a quieter, harder story: margin pressure, slower payments, and the daily discipline of running a restoration business when the phone isn't ringing the way it used to and required a more proactive approach to revenue and profitability.

And yet — here we are, with an industry that refused to be knocked down. Restorers, kudos!

What this year's data revealed is that the restorers who are thriving aren't waiting for the weather to cooperate. They're diversifying into private pay. They're building stronger documentation habits. They're investing in their people and running tighter processes. They're the ones who treated 2025 not as a setback, but as a stress test and came out of it with leaner, stronger organizations.

On the M&A front, the picture is nuanced. Some of the largest restoration companies have slowed or paused their acquisition activity as integration complexity and capital costs have caught up for the moment. But don't mistake a pause for a retreat. PE interest in the restoration space remains real and persistent and there are plenty of regional and mid-market buyers still actively looking. If you've been approached, or if you're thinking about your long-term exit, the data in chapter 2 offers useful context on where the market is today.

For the first time, we surveyed across a full calendar year, giving us better data and more reliable trend lines than we've ever had. I hope you find it useful, provocative, and worth sharing with your team.

In partnership,

Michelle Blevins

Publisher, C&R Magazine



The restoration industry is in the middle of sustained change: tighter margins, shifting carrier expectations, reduced claim volume, slower payments, and new technologies promising solutions to all of it.

Leading a team through change is not straightforward.

What I've observed is that most change efforts in this industry don't fail because the strategy was wrong or the wrong tool was selected. They fail because the change never truly took hold in the workforce.

In a people-powered industry, even the noblest transformation efforts don't matter unless that change reaches the front lines. Not in theory. In practice. And that's where many organizations get stuck, in the valley of death between decision and adoption.

Leaders align on strategy, communicate it downward, and expect it to cascade throughout the organization with the same enthusiasm and urgency they feel at the top.

But change doesn't move at the speed of decision; it moves at the speed of adoption. That is the constraint.

In software-driven environments, change can be deployed quickly. In people-powered businesses, change has to be absorbed, or said another way, digested, and carried by the people doing the work.

That is why restoration leaders need to hone three things right now: clarity, conviction, and change management. Clarity on what is actually changing, and what is not. Conviction to lead without constant recalibration in front of the team. And a practical understanding of how change is experienced on the front lines.

Because right now, teams are looking for clarity and the confidence that comes from decisive leadership.

My friend, that is why we produce this report every year.


Across four years of data, our goal is to help you answer four essential questions:

- What is changing?
- Why is it changing?
- What is not changing?
- And what does it require of you as a leader now?

If this report sharpens those answers—and helps you turn change into traction across your team—it has done its job.

Building alongside you,

Leighton Healey
CEO, KnowHow

An aerial photograph showing the aftermath of a wildfire in Malibu, California. The landscape is covered in a thick layer of grey ash and debris. Several large, modern houses with blue-tinted windows are visible, some appearing partially destroyed or surrounded by rubble. A tall palm tree stands prominently in the center. In the foreground, a blue utility vehicle with a crane-like arm is parked behind a chain-link fence. The sky is a clear, pale blue.

The Palisades and Eaton Fires Caused Over \$60 Billion in Damage, Making Them The Most Expensive Wildfire Events in History.

Malibu, United States – February 14, 2025: Aerial view of the Malibu landscape affected by the Palisades Fire. (Cover photo by Wirestock/iStock Photo)

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INTRODUCTION

This is now the fourth year we have done this. Four years of asking the restoration industry hard questions, compiling the answers, and doing our best to give you something useful in return. And every year, we are struck by the same thing: how willing this industry is to be honest.

When we ask what's keeping you up at night, you tell us.

When we ask how hiring is going, you reveal the inner workings of your team.

When we ask whether you'd recommend working with TPAs, you tell us that too - even when the answer is more complicated than a yes or no.

The candor in this data is one of the things that makes it worth reading, and one of the things that makes this project worth doing year after year.

What the 2025 data shows is an industry that has been through the trenches and come out the other side with many lessons learned, and some shifts in both performance and perspective. The last 18 to 24 months have been tough for a lot of companies - marked by fewer claims, slower payments, and tighter margins. Many of the restorers who responded to this survey spent that year doing unglamorous work: tightening processes, investing in people, fixing the things they had been putting off.

The 2026 outlook suggests that work is paying off. More than 80% of respondents anticipate

growing revenue this year. That is not blind optimism. That is an industry that has earned the right to press forward, and step into our era of human-focused efficiency.

Still, while the outlook has improved, this report is far from a victory lap. In fact, it is re-inforcement of some foundation problems the industry faces. Getting paid remains the industry's defining challenge. AI adoption is nearly universal, but the gap between companies using it to write emails and companies building real operational advantage is widening fast. And the residential share of work has hit a record high - yes, we know you want to dive into this, and yes - it is the opposite of what the industry historically has reported wanting.

The data in these pages will help you figure out where you stand and, more importantly, what to do about it.

Key Themes Inside:

The share of companies doing 75%+ residential work hit an all-time high in 2025.

Revenue optimism is strong: Over 80% of restorers expect to grow revenue in 2026.

Getting paid has overtaken hiring as the industry's #1 pain point.

AI adoption is broad, but shallow.

Employee tenure is improving, especially at the entry level - a sign that retention investments may be working.

Acquisition interest is present but split.

CHAPTER 1

REVENUE & SERVICES

Key Highlights:

- The residential share of work shifted to its highest point in the survey's history: 67.31% of companies now report doing 75%+ residential work, up from 59.78% in 2024.
- In the 2025 Pulse Check, restorers predicted their revenue bracket — and slightly more ended up in the \$1–5M range than anticipated.
- Optimism held: over 80% anticipate revenue growth in 2026.

According to Verisk, overall claim volume was down approximately 20% in 2025. Read that again. One in five claims that would have existed in a normal year simply didn't. And yet restoration companies kept working. Revenue held. Optimism for 2026 is at its highest point in four years of this survey, a point we really emphasized in the 2025 Pulse Check report.

That is the resilience story. That is what the data is actually saying.

When we look at the residential share of work reaching 67.31% (its highest point in the survey's history) the instinct might be to read that as the industry retreating to its comfort zone. We'd push back on that interpretation. Restorers handle complex large losses every day. They are on commercial jobs, CAT work, and multi-phase reconstruction projects that most industries would find unrecognizable. The residential percentage doesn't define the capability of this industry.

What it does tell us is something more specific: in a year when overall volume contracted

sharply, restorers doubled down on proactive revenue, which meant more actively pursuing residential leads they may have ignored in previous years in favor of a heavier commercial load. Pipes burst regardless of the economy and policyholder behavior. Residential property damage doesn't wait for a favorable interest rate environment. When the top end of the market thinned out by fewer large commercial losses, tighter carrier scrutiny, slower project pipelines, residential work remained, especially the higher dollar-number residential projects.

The companies in this survey kept the lights on, kept their teams employed, and kept growing during a year when the broader market gave

ARE YOU READY TO SCALE IN 2026?

Growth without infrastructure is chaos in more trucks.

Get the new playbook for building scalable restoration teams from KnowHow.

From Bottlenecks to Breakthroughs x5

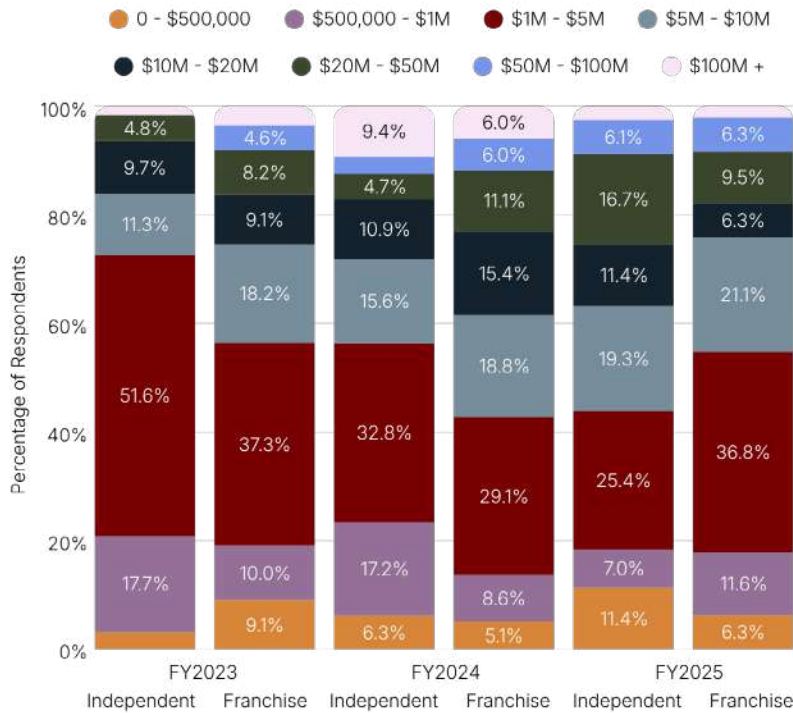
THE NEW PLAYBOOK FOR BUILDING SCALABLE RESTORATION TEAMS

The construction team is growing steadily, but your company isn't. You're stuck in a cycle of inefficiency, slow growth, and high costs. It's time to break through.

With the right playbook, you can build a scalable restoration team that can handle any size job, from small residential to large commercial. This playbook provides the tools, strategies, and best practices you need to succeed in 2026.

Download the playbook now at [knowhow.com/playbook](#)

Revenue Distribution of Respondents



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them 20% less to work with. That is not a story about what kind of work restorers do. That is a story about how resilient this industry is.

The Mid-Market Holds Steady

The largest share of survey participants continues to cluster in the mid-market revenue brackets. This has been consistent across all four years of the State of the Industry report, and 2025 is no different.

This isn't just a function of who responds to the survey. It reflects the actual shape of the industry - a large, capable middle class of restoration

companies handling the bulk of residential and commercial loss work across North America. The very large players and the very small ones are both represented, but the middle is where most of the industry lives.

What's different this year is the mood. Heading into 2025, most restorers expected slow or modest growth. Many spent 2024 focused on tightening operations, improving cash collection, and investing in their people. That work appears to be paying off. More than 80% of survey participants now say they anticipate

75%

67% OF COMPANIES REPORTED THAT 75% OR MORE OF THEIR WORK WAS RESIDENTIAL IN 2025 - THE HIGHEST SHARE IN THE SURVEY'S HISTORY.

growing revenue in 2026.

Residential Work Hits a New Record

Every year, we ask restorers to break down their mix of commercial versus residential revenue. And every year, a familiar pattern emerges: most companies are doing mostly residential work, most of them would like to do more commercial work, and most

of them haven't been able to make that happen.

In 2025, the residential share of work didn't just hold steady; it grew to its highest point in four years of surveying.

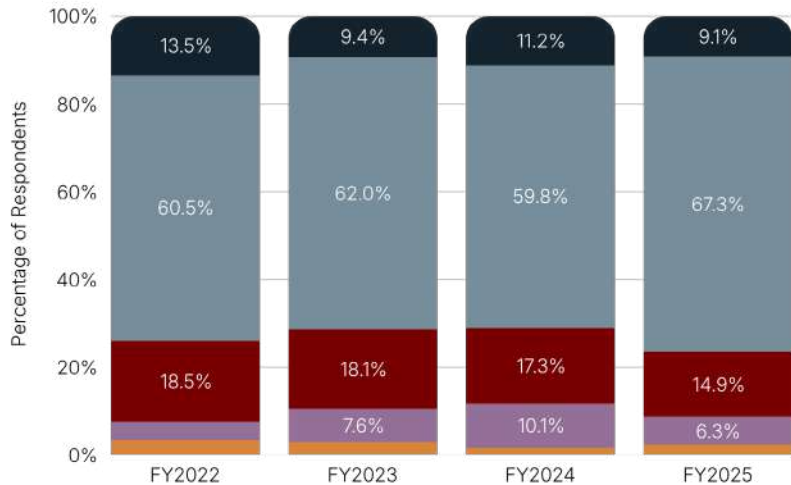
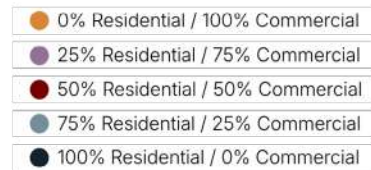
That number was about 60% in 2022 and 2024. The industry has now crossed into new territory on this question, and the direction is clear.

Why? A few reasons. Residential claims are more

50%

WATER DAMAGE DROPPED TO 50% IN 2024 AS COMPANIES DIVERSIFIED INTO RECONSTRUCTION AND OTHER SERVICES. IN 2025, IT CAME BACK TO 64%.

Year-over-Year: What Portion of Your Work Has Been Residential vs. Commercial?



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accessible. They require less capital, less multi-stakeholder management, and a shorter sales runway than commercial work demands. The restoration industry is very good at residential work. It has built its infrastructure, its staffing models, and its software tools around residential work. Commercial is possible, and many companies do it well, but the barriers to growing commercial revenue are real, and the data suggests most companies are not clearing them.

If your company has been trying to grow commercial revenue and the needle hasn't moved, you are not alone. For those serious about making the shift, the 2024 report put it

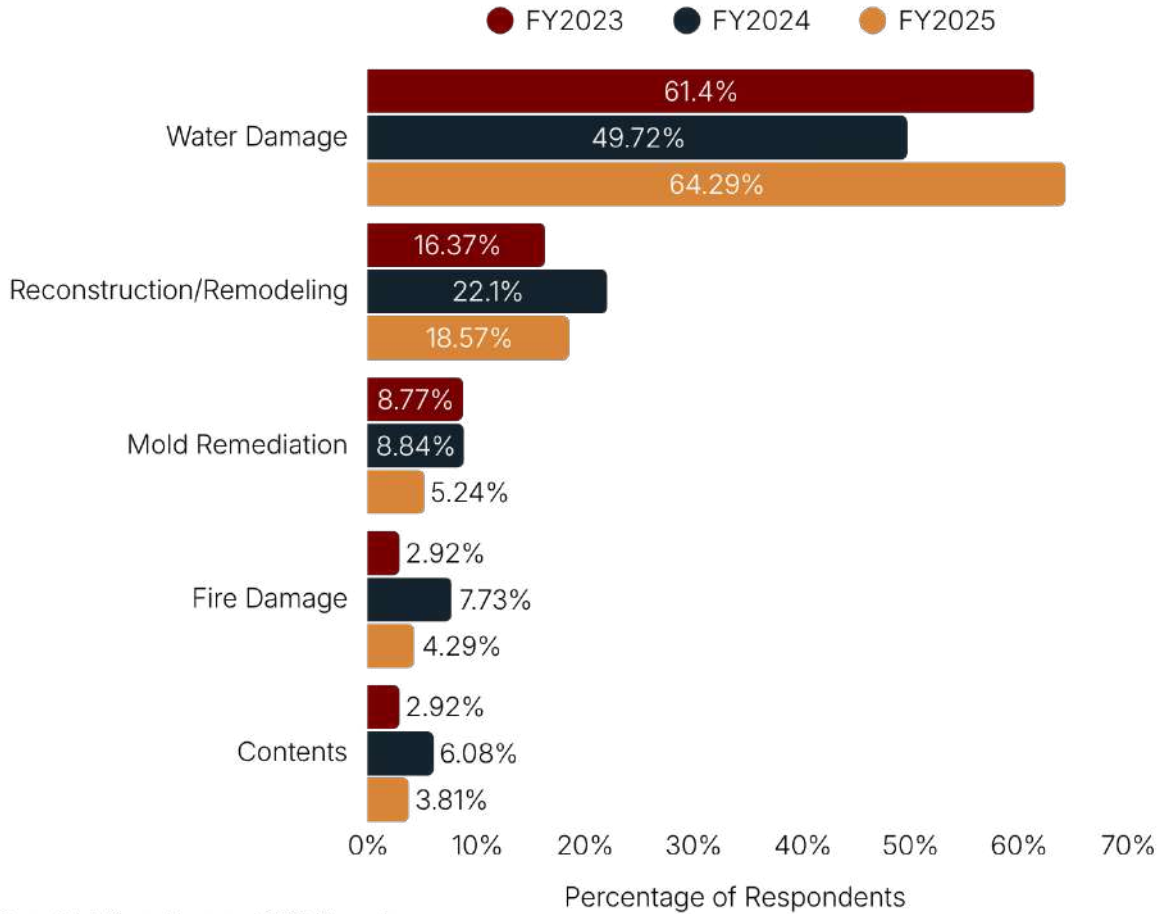
plainly: it takes time, dedicated hiring, and operational investment. It cannot be rushed.

Water Damage Is Back

In 2023, 61% of restorers named water damage restoration as their #1 service category. Then in 2024, that number dropped sharply to 50%, the first time it had fallen below 50% in the survey's history. Lower claims volume pushed companies to diversify. Reconstruction work climbed. Fire damage and contents work grew. Mold remediation held steady.

In 2025, water damage bounced back to just over 64%. More than just a recovery, this marks a new three-year high.

Year-over-Year: What is Your #1 Service Offering?



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WE ASKED

WHAT SERVICE LINE DID YOU ADD?

YOU SAID

- Duct Cleaning
- Reconstruction
- Contents
- Asbestos Abatement

The reconstruction surge of 2024 (up from 16% to 22%) has partially unwound. It settled back to about 19% in 2025. That’s still higher than the 2023 baseline, which suggests some companies that built out reconstruction capability during the slow year are keeping it active.

Fire damage and contents both spiked in 2024 and corrected in 2025, following the same pattern. Companies diversified when they needed to. Now they’re back to what they’re best at.

What Restorers Are Predicting for 2026

For the past two years, this survey has asked restorers to predict which revenue bracket they expect to land in - and compared those predic-

tions to actual results.

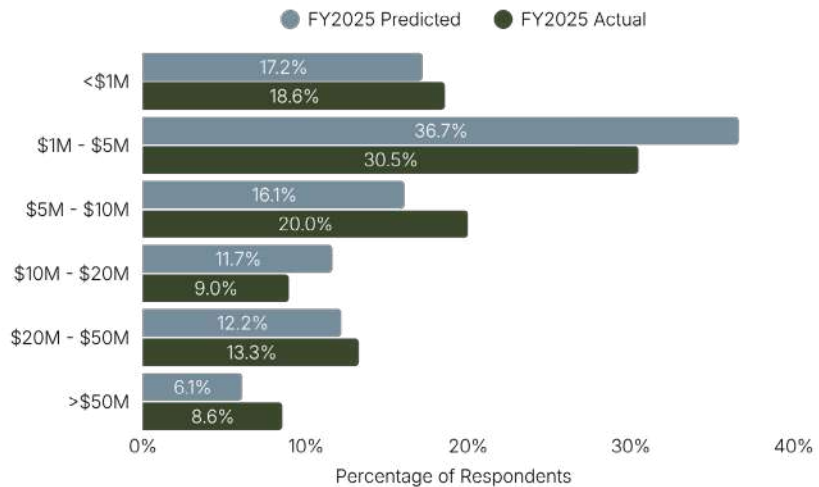
In 2025, slightly more restorers ended up in the \$1–\$5M bracket than their own predictions suggested. The industry landed a little lower than it expected. And yet, optimism for 2026 isn't wavering, instead it's growing in the face of opposition.

More than 80% of restorers anticipate growing their revenue in 2026. That is a notable shift from the cautious outlook of a year ago, when most restorers expected flat or modest growth at best.

Some of that optimism is earned. Companies that survived 2024's cash crunch, invested in their teams, tightened their operations, and leaned into efficiencies driven by software and AI are in a stronger position than they were two years ago. The industry has absorbed a difficult period and come through largely intact.

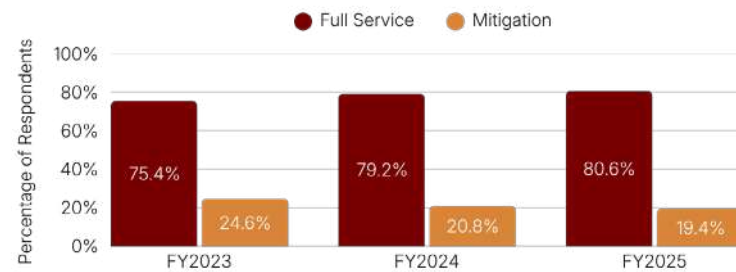
Whether 2026 delivers on that optimism will depend on claims volume, the getting-paid problem, and a dozen other variables restorers can't fully control. But the fact that most of the industry is leaning forward rather than bracing for impact is meaningful.

Revenue Forecasting



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Year-over-Year: Do You Provide Full Service or Mitigation Only?



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What To Do With This

First, let's talk about opportunities really quick. While the data won't dive into this, you'll find a lot of other content surrounding a category of weather activity worth watching closely heading into 2026: severe convective storms. Tornadoes, large hail, and straight-line wind events have continued to track upward in frequency and severity, even in years without a marquee hurricane season.

We anticipate seeing this trend grow in future State of the Industry reports. Restorers who have historically relied on coastal CAT events for their biggest revenue surges should be paying close attention to the convective storm corridor — and positioning themselves accordingly.

If you are in the mid-market doing mostly residential water damage work, the 2025 data says you are in good

WE ASKED

WHAT IS THE BIGGEST FACTOR LIMITING YOUR COMPANY'S GROWTH GOING INTO THE NEXT YEAR?

YOU SAID

- “Sales, sales, sales! All of our company priorities are focused on sales. Our production teams are equipped to scale, we just need to lead flow to provide room for our teams to run.”
- “We just invested in 2025 in our first 3 business development people. Penetrating commercial markets for growth.”
- “Cost of doing business (primarily marketing) and pricing pressure from competitors.”
- “Lack of CAT and lack of weather events in our service area - the weather pattern has become extremely mild which is bad for claims.”

company among your peers. If you have been trying to grow commercial revenue, the data is telling you, “be patient.” Most companies have not cracked it.

And if you are heading into 2026 expecting growth, you are in good company. Just make sure your operations, your staffing, and your accounts receivable process are ready to handle it when it arrives.

TEAM DISCUSSION TOPICS

1. The industry's residential work mix is at a record high — does ours match? Is that a deliberate strategy or a default? What would it take to actively pursue one large commercial account this quarter?
2. Industry claim volume was down 20% in 2025. What specific actions did we take to counteract this headwind, and which of those should we keep doing permanently?
3. Are we positioned to capture severe convective storm work (tornadoes, hail, wind events)? What would we need to do in the next 90 days to be ready?
4. Over 80% of restorers expect revenue growth in 2026 — what are our top three revenue levers, and do our current staffing and operations actually support that growth if it arrives?
5. Water damage bounced back to 64% as the top service — does our current team capacity, equipment, and marketing reflect that as our core strength?

CHAPTER 2

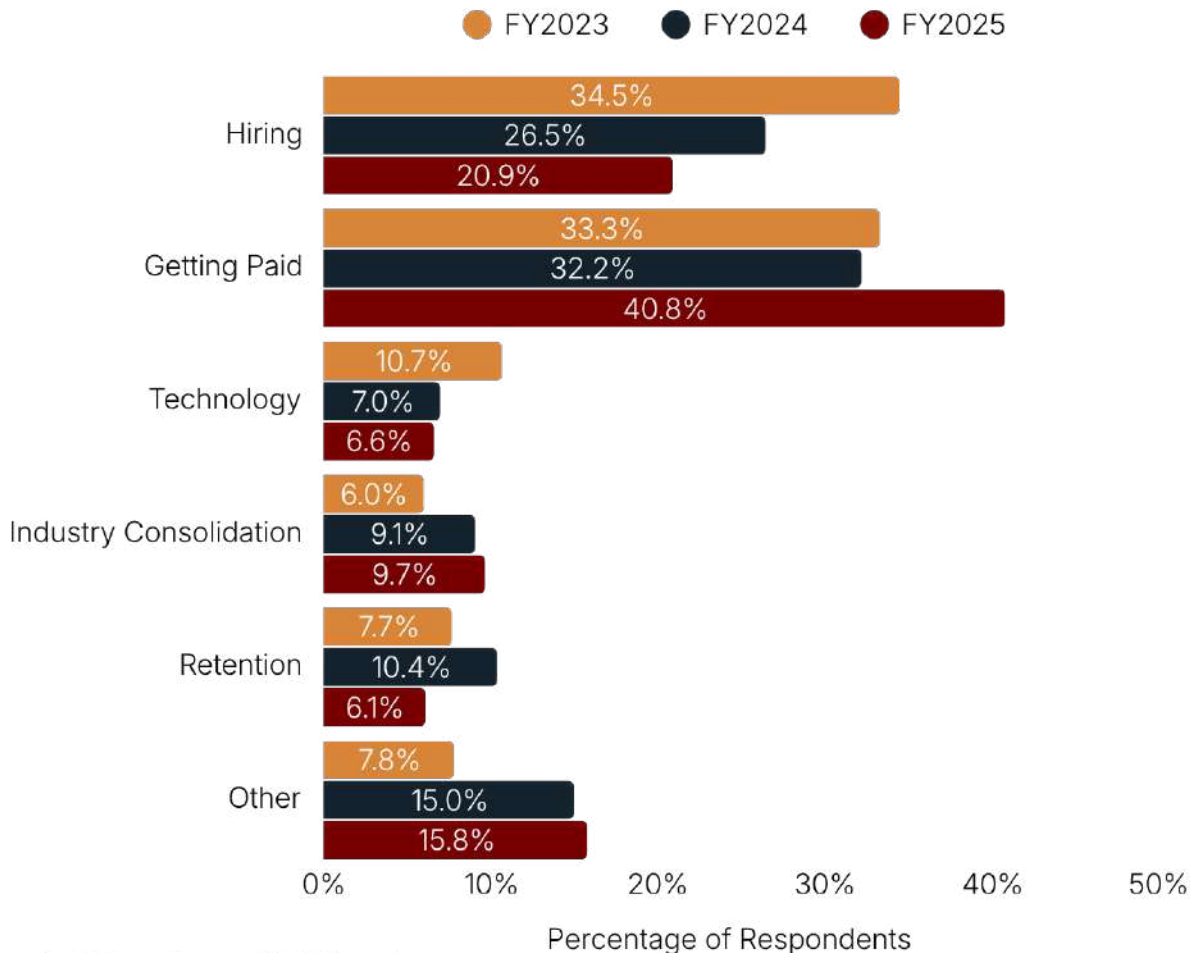
GETTING PAID

Key Highlights:

- Getting paid has increased its margin as the #1 problem.
- The complexity of TPA relationships, carrier negotiations, and supplement approvals are contributing factors.
- There are several layers to this issue, making it more complex to solve - but it is also an area getting the most attention from industry advocates, taskforces, and lobbyists.

Getting paid took the title as the #1 thing keeping restorers up at night back in 2024, and is keeping a firm grip on that top slot. Unfortunately, this is an area the industry really needs to

Year-over-Year: What Do You Find as the Biggest Challenge for Your Restoration Company?



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collaborate on, and one organizations like the RIA's Carrier Relations Taskforce are working hard to alleviate.

The Backdrop

To understand where the industry is in 2025 on this issue, it helps to remember where it was in 2024. That year, three things happened at once: claims volume dropped, payment timelines stretched, and cash reserves thinned.

By the end of 2024, nearly three-quarters of restorers said it took 30 days or more to receive payment. The share of companies waiting 60 days or more grew. Accounts receivable processes that had been adequate in a normal year were exposed as insufficient in a tight one.

The 2024 report's guidance

was direct: make profitability a team sport, tighten AR processes, tie variable bonuses to collection KPIs. Unfortunately, even weaving in those best practices has not solved the problem.

Why It's Hard

The getting-paid problem in restoration is not one problem. There are several problems wearing the same hat.

There is the TPA problem: managed repair programs typically pay on their own timelines, which are often slow and not negotiable. Companies that increased their TPA reliance in 2024 may have traded one cash flow issue for another.

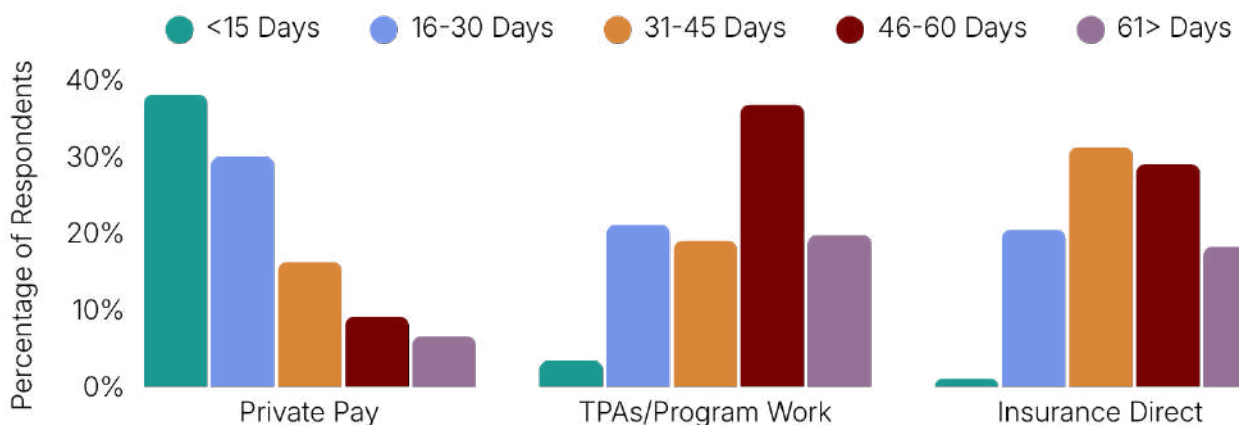
There is the supplement problem: when scope changes require additional payment,

getting carriers to approve and pay supplements is a time-consuming process with no guaranteed outcome. Companies that are good at documentation get paid faster. Companies that are not lose margin they earned.

There is the carrier problem: some insurance carriers are simply slower than others, and some are harder to deal with than others. Knowing which carriers you want to work with — and which you don't — is a legitimate business strategy.

And there is the internal process problem: many restoration companies do not have clean, consistent AR processes. They chase payments reactively instead of building collection into the workflow from the start of a job.

FY2025 by Source: How Long Does it Take Your Company to Collect Payment, in Full, After a Job is Complete?



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WE ASKED

WHAT ARE SOME ASPECTS OF THE INDUSTRY THAT YOU THINK ARE DYING AND NEED TO TRANSITION OUT?

YOU SAID

- “Over-reliance on insurance-only work. Blind loyalty to one or two TPAs. We need to move to direct-to-consumer marketing for water, fire, and specialty drying. Focus on more commercial, municipal, and healthcare work.”
- “Insurance not willing to speak about pricing and trying to only pay what they are going to pay without a discussion.”
- “The duplicated and manual processes based on legacy systems that cannot be updated. Burn the boats and move forward.”

GETTING PAID STARTS ON THE JOB SITE NOT IN ACCOUNTING

Download the playbook for better estimating, faster training, and better communication in a difficult market.



What Progress Looks Like

Not all of the news is bad. The 2025 data will show whether the operational improvements many companies made in 2024 — tighter AR processes, more proactive collection, better documentation — are translating into faster payments.

The companies that tied manager bonuses to AR timelines, that built weekly AR aging reports into their operations, that trained their teams to set clear payment expectations with customers at the start of every job — those companies should be seeing the return by now. If they are not, the problem is structural, not operational.

What To Do With This

Bill faster. The 2024 report cited the advice from one industry consultant: bill within 24–48 hours of job completion, follow up within 72 hours to confirm receipt. That window matters more than most companies treat it.

Know who has the money on every job. Every job file should document the path to payment — who owes what, when it's due, and who on your team is responsible for collecting it.

Make collections a team priority, not an accounting afterthought. If your AR process is invisible to the people doing the work, it will stay slow. The companies that win on cash flow are the ones where everyone from the project manager to the field tech understands that getting paid is part of doing the job.

TEAM DISCUSSION QUESTIONS

1. Walk through our current AR process step by step — at what point does a job “close” financially, and who is accountable for getting that payment in the door?
2. Are we billing within 24–48 hours of job completion? If not, what's the actual average, and what's causing the delay?
3. Do every project manager and field tech on our team understand that collecting payment is part of completing the job — or is it treated as someone else's problem?
4. Which carriers or TPAs consistently pay the slowest? Are we tracking that data, and should we be making different decisions about which work we accept based on it?
5. If we tied a portion of manager bonuses to AR aging metrics, would our current managers be motivated or frustrated — and what does that answer tell us about our culture around cash flow?

CHAPTER 3

THIRD PARTY ADMINISTRATORS

Key Highlights:

- 64% of restorers use TPAs in some form - a figure that has remained relatively stable in recent years.
- Among TPA users, usage is increasing year-over-year.
- Tension remains when it comes to TPA work.

The restoration industry's relationship with third-party administrators has always been complicated. Third-party administrators serve as the intermediary between carriers and contractors - helping assign out and monitor jobs, often through strict guidelines on behalf of the carrier. Companies use them, complain about them, say they want less of them, and then take on more of them anyway. Some companies thrive and master the requirements; others fail.

In 2025, that dynamic has not changed. What has changed is the depth of the contradiction. The majority of companies use TPAs. The majority of companies would not recommend them. And among those who do use TPAs, reli-

ance is growing.

The Numbers

64% of restorers use TPAs in some form. That figure has remained relatively stable over recent years. But stability at the top level masks what is happening underneath it.

Among companies that do use TPAs, usage is increasing. TPAs are becoming a larger share of revenue for the companies that rely on them — not a smaller one. The companies that leaned into TPA work during 2024's slow claims year largely kept leaning.

At the same time, 61% of restorers, including many who use TPAs regularly, said they would not recommend TPAs to their peers. That number is striking. It means that a meaningful portion of the industry is doing significant TPA work while simultaneously telling anyone who asks that it isn't worth it.

Why Companies Stay

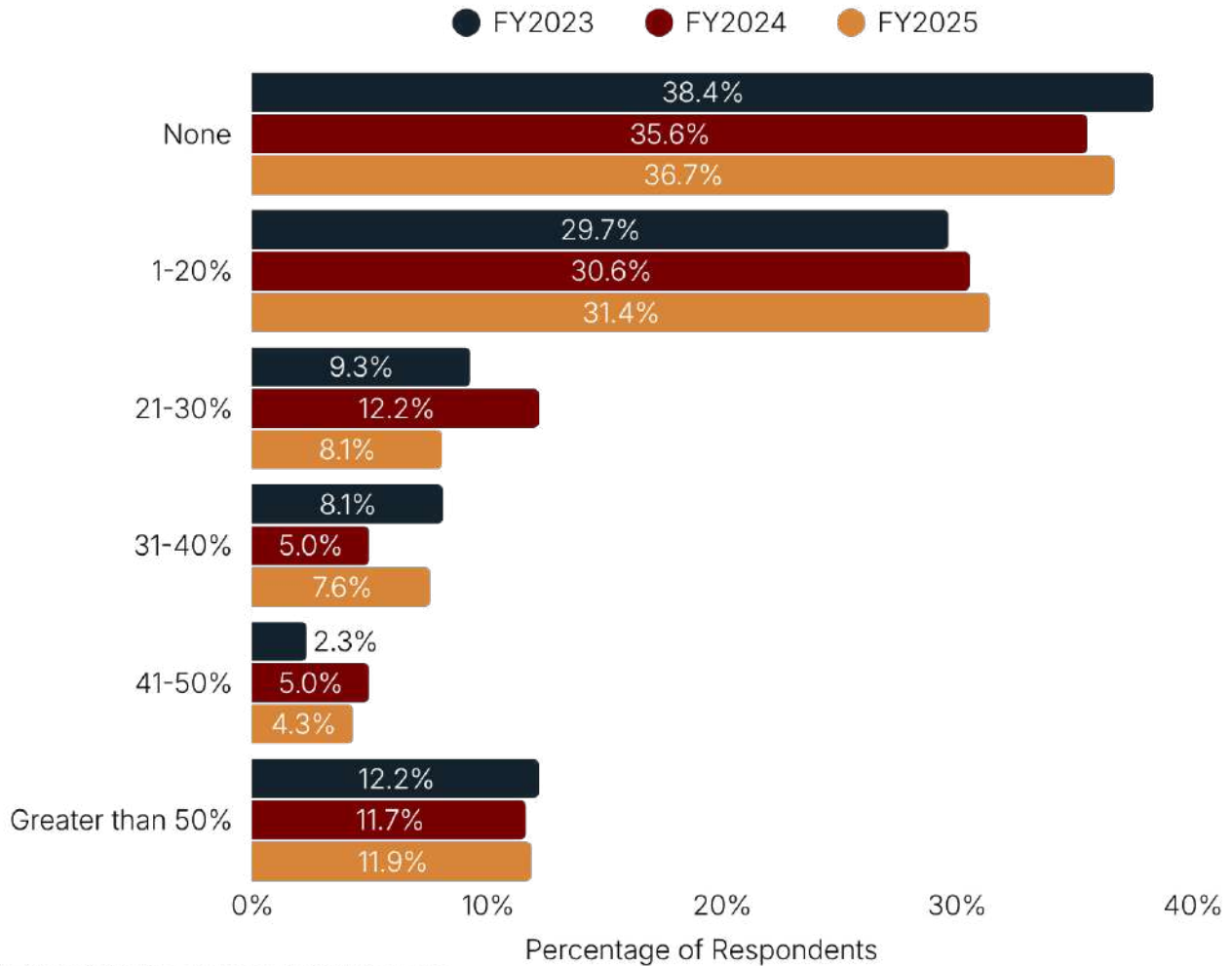
It is worth asking: if most TPA users wouldn't recommend them, why do they keep using

64% OF COMPANIES USE TPAS. 61% WOULDN'T RECOMMEND THEM. THE GAP BETWEEN USAGE AND ADVOCACY IS ONE OF THE DEFINING TENSIONS IN THE INDUSTRY.

them?

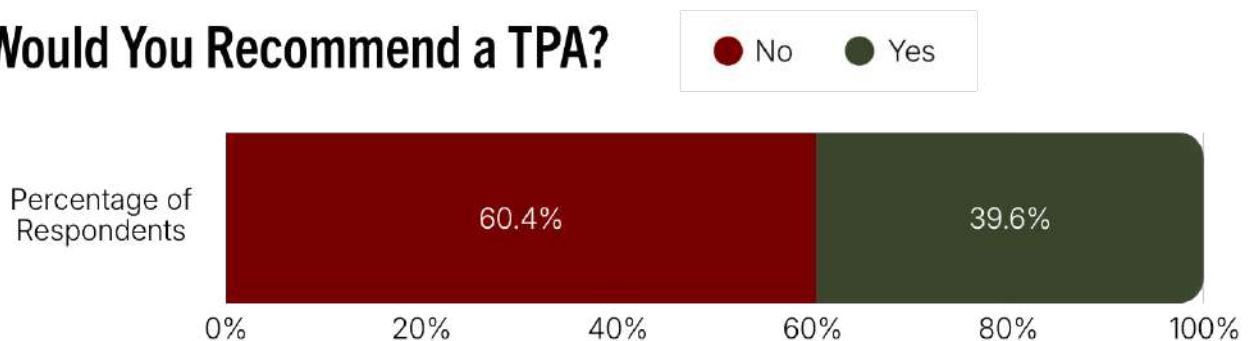
The honest answer is cash flow. In a year with fewer storms and reduced claims volume, TPAs offer something valuable: a steady stream of work. The margins are lower. The requirements are more demanding. The administrative burden is higher. But the jobs keep coming. And, companies

Year-over-Year: What Percentage of Your Jobs Last Year Were Sourced from Third-Party Administrators (TPAs)?



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Would You Recommend a TPA?



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that excel with program work may also be ahead of the curve

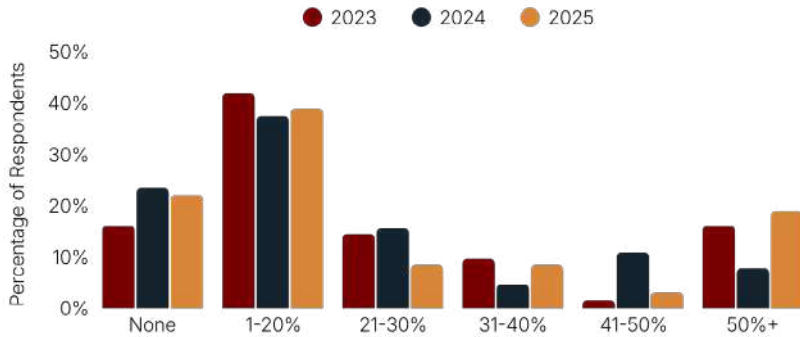
in standardized processes across the board because re-

quirements are so stringent.

For independent restoration companies in particular, that predictability has real value. The 2024 data showed a sharp increase in TPA reliance among independents - and that trend appears to have continued. When you are running a small or mid-sized company and the phone isn't ringing on its own, a managed repair program starts to look more attractive, regardless of your feelings about it.

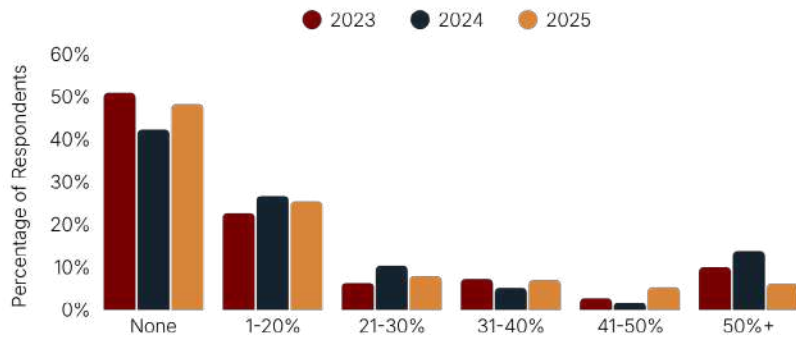
Franchise companies, by contrast, showed a different pattern. Many appear to be diversifying away from TPA work, seeking to protect margins by developing alternative referral sources. Two different approaches to the same underlying problem.

Year-over-Year: Jobs Sourced from TPAs, Franchise



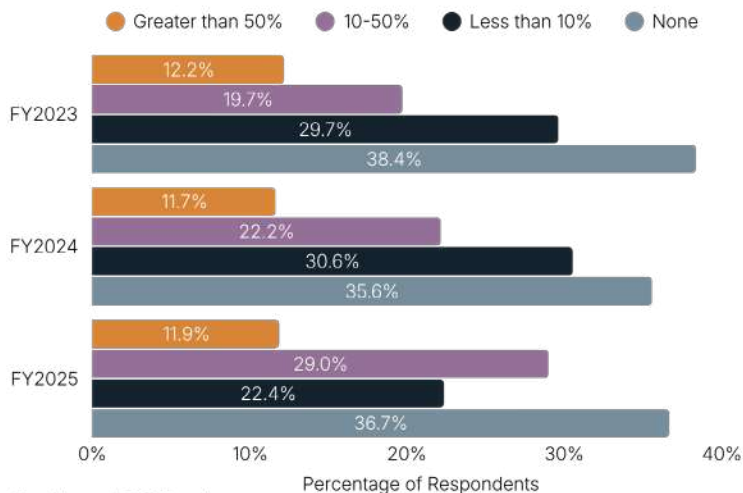
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Year-over-Year: Jobs Sourced from TPAs, Independent



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Year-over-Year: Percentage of Companies Deriving More Than 50% of Revenue from TPAs



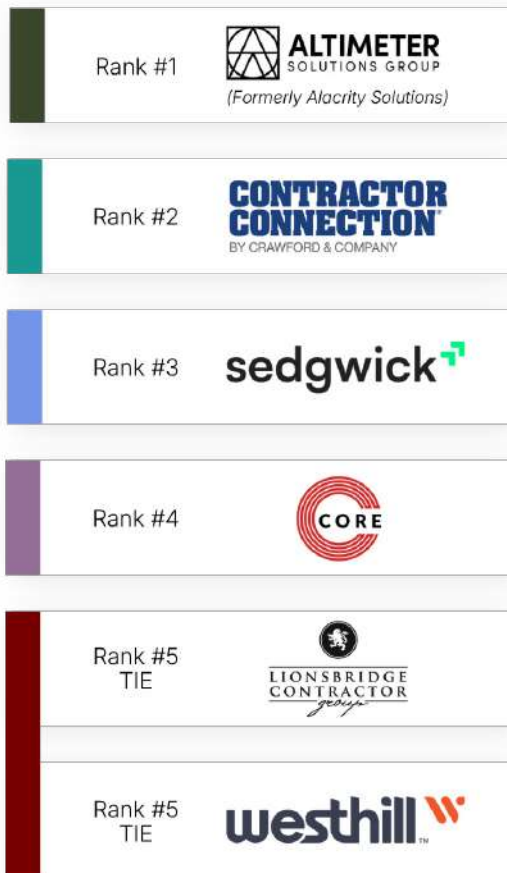
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What To Do With This

If TPA work is part of your revenue mix, be honest about why. If it's because the margins are acceptable and the work fits your operation, that's a legitimate strategy. If it's because you haven't built a strong enough direct referral pipeline, that's a problem worth solving.

If you want less TPA work in 2026, build the alternative first. The 2024 report made this point plainly: don't get wooed away by the prospect of

Top TPAs of FY2025



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better margins without accounting for the full cost of replacing that job source.

And if you are considering entering TPA networks for the first time: go in with clear eyes. The data says most of the people already there wouldn't tell you to join them.

Team Discussion Questions

1. What percentage of our revenue comes from TPA work right now — and is that number going up, down, or holding steady? Is that intentional?
2. If 61% of TPA users wouldn't recommend them, why are we in (or considering) TPA networks — and is that reason still valid today?
3. What would our cash flow look like in the next 90 days if we removed all TPA work from our pipeline? What does that tell us about how dependent we are?
4. Are we actively building direct referral sources — plumbers, realtors, property managers — so that TPA work is a choice, not a lifeline?
5. For companies using TPAs: are we tracking our actual margin on TPA jobs vs. direct jobs? If we haven't done that math recently, let's do it in this meeting.

CHAPTER 4

ARTIFICIAL INTELLIGENCE

Key Highlights:

- 84% of the industry is open to or fully embracing AI - a true evolution over the past three years.
- Despite high adoption sentiment, true usage has not evolved.
- A widening gap is emerging between companies using AI as a productivity tool and those building real operational infrastructure.

Eighty-four percent of the restoration industry is now open to or fully embracing artificial intelligence. Three years ago, that number was closer to 70%. The trajectory is clear, and the momentum is real.

But momentum is not the same as transformation. And in 2025, the honest story about AI in restoration is this: the industry has opened the door wide, and most companies are still standing in the entryway. It is time to get moving, or get left behind.

Writing emails. That is still the dominant use case. At every company size. In every region. For the third year run-

ning. That is no longer enough.

The Adoption Curve

The shift in AI sentiment over three years has been substantial. In 2022, a meaningful portion of the industry was skeptical or actively opposed. By 2023, the majority had moved to openness. By 2025, 84% describe themselves as open to or fully embracing AI, with the ‘fully embracing’ cohort growing year over year.

Concerns about AI have declined, too. Where 18% of respondents expressed concern about AI in 2023, that number has dropped to 14% in 2025. Resistance is shrinking.

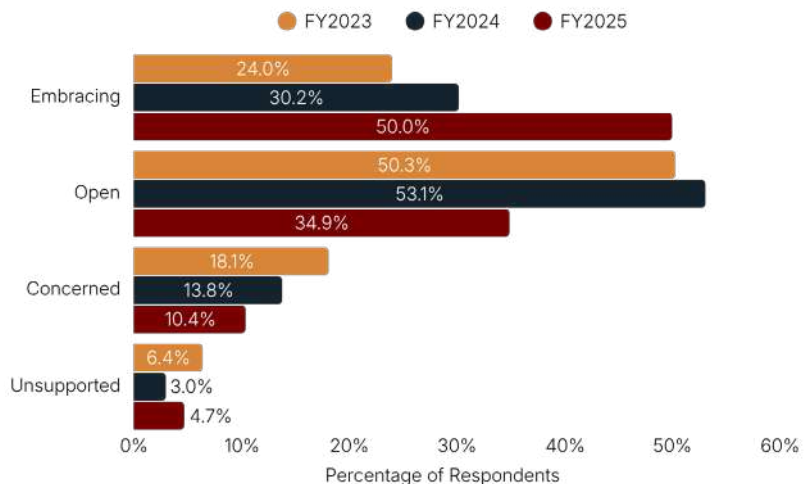
Buy-in is growing.

Real Uses for AI in Restoration

Nearly 68% of restoration leaders report using ChatGPT or an equivalent tool for writing tasks — drafting emails, rephrasing communications to carriers and adjusters, writing job descriptions, etc. Another 47% say they are using AI-enabled apps embedded in their existing software stack.

That’s a lot of companies using AI to do things they could have done without it. Which is not nothing - any efficiency gain is a real gain, especially with the reduction in claim volume and overall

Year-over-Year: AI Sentiment



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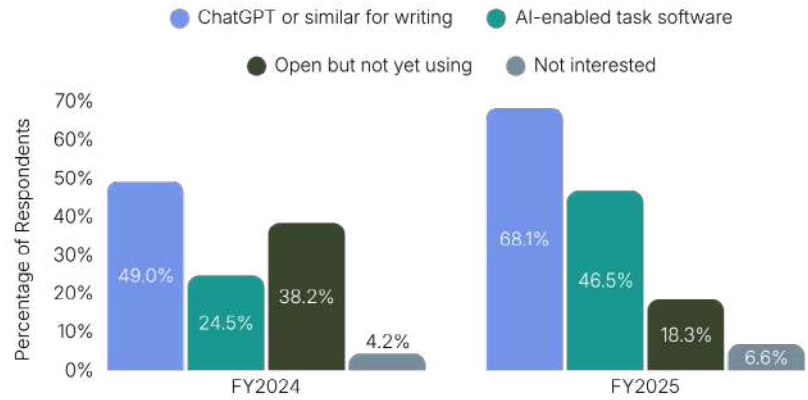
need for operational efficiency to be truly profitable as margins narrow. But the majority of restoration companies are a long way from truly harnessing AI.

When asked which department they most want to enhance with AI, 36% of restorers chose estimating and job site documentation. Training and knowledge man-



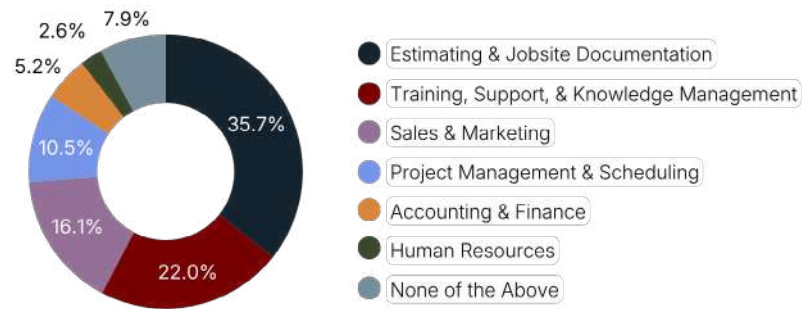
THE GAP BETWEEN COMPANIES USING AI AS A WRITING TOOL AND COMPANIES BUILDING REAL OPERATIONAL INFRASTRUCTURE IS WIDENING - AND IT IS BECOMING A COMPETITIVE ONE

How Are You Using AI Today?



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Which Department Would You Most Enhance with AI?



Percentage of FY2024 Respondents

© Copyright: KnowHow and C&R Magazine

agement came in at 22%. Sales and marketing at 16%. Project management at 10%.

The appetite is there. The deployment isn't. Estimating and documentation are still being handled mostly the same way they were before AI became a household term.

When it comes to AI tools and platforms, a handful of names come up repeatedly as the industry's default starting points. These are the tools restoration leaders are actually

using - not the ones you've heard about at conferences. You'll find more about this in the next chapter.

The Gap That Matters

Here is the competitive reality of AI in restoration right now: the companies that are using AI only to write emails are getting a small efficiency gain, if any gain at all in a world largely adopting this tool in the exact same way. The companies that are building AI

84%
**OF RESTORERS
ARE OPEN TO AI.**

Discover the biggest AI unlocks transforming operations at restoration companies.

Get the exclusive white paper from KnowHow.

MOST ARE STILL USING IT TO WRITE E-MAILS.



into their estimating workflows, their documentation processes, their training programs - those companies are building a compounding advantage.

That gap is still small. But it grows every year. And the companies on the wrong side of it will feel it before they can see it. The problem here is that if you end up too far behind the curve, catching up will be increasingly difficult.

The 2024 report predicted that 2025 would be the year restoration leaders demand proof that AI makes a bottom-line difference. That reckoning is underway. The companies that can point to specific, measurable improvements are pulling ahead. The ones still talking about AI in the abstract are falling behind.

What To Do With This

If your team is using AI to write emails, that's a start. Don't stop - but don't stop there either.

WE ASKED

WHAT IS THE BIGGEST IMPACT AI HAS HAD ON YOUR BUSINESS SO FAR?

YOU SAID

- "I've downsized almost all of my admin work. We're at the "AI-Enabled" stage. The goal is to be 100% AI-driven by end of 2027, excluding field labor."
- "There is a lot of buzz with AI, and I think it will be useful in the future, but it hasn't really provided a lot of value yet. Estimating should be the first task solved by AI."
- "Automation and efficiency. This has allowed us to refocus staff on customer and client interactions."
- "It's allowed me to charge more on my Xactimate estimates as it finds gaps between my documentation and my estimate."

Pick one operational problem that costs you time or money every week, and spend 90 days

trying to solve it with AI. Estimating. Documentation. Onboarding. Pick one.

Ask your vendors how they're incorporating AI into their product offerings. Technology vendors and software providers have the ability to embed artificial intelligence deep into the core of their offerings. Quite simply, your vendors should be able to offer you 3-5x the value they were offering you only a few years ago thanks to the advent of AI. If that's not the case, they're letting this moment pass them by.

If you haven't started at all, the barrier is lower than you think. Most of the tools your competitors are using are tools you already have access to. The question is whether anyone on your team has the mandate to actually use them, or know how to use them. If you're feeling this way, perhaps look for a way forward that doesn't feel like a heavy lift. Remember when posting to social media first became a must for competitive businesses? But you could hire someone right out of college who could master it for you? Ditto for AI today.

And if you're already building AI into your core operations: measure it. It can be easy to spend hours setting up workflows and use cases in ChatGPT that feels productive, but ultimately fails to affect any business outcome. If you can't show the business impact, you won't be able to protect the investment when things get tight.

Team Discussion Questions

1. **Be honest: what is our team actually using AI for right now? Is it mostly email drafting, or are we using it in estimating, documentation, or training?**
2. **Pick one operational problem that costs us time or money every week — estimating, onboarding, job documentation, scheduling. What would it look like to spend 90 days trying to solve it with AI?**
3. **Do we have anyone on the team with an explicit mandate to explore and implement AI tools — or is it happening informally (or not at all)?**
4. **If our competitors are building AI into their estimating and documentation workflows and we're still using it for emails, what is that gap going to cost us in two years?**
5. **Can we point to a specific, measurable improvement that AI has delivered in our business? If not, that's our assignment: identify one metric to improve and connect it to an AI tool within the next quarter.**

CHAPTER 5

THE WORKFORCE

Key Highlights:

- Hiring is now a distant second “problem” to getting paid.
- Entry-level technician tenure has improved significantly.
- Starting wages, training methods, and sourcing channels are all in flux as companies adapt to a changing labor market.

In 2022, hiring was the restoration industry’s biggest problem, period. 35% of restorers named it as their top challenge. It was the conversation at every conference, the subject of every panel, the thing keeping

owners up at night.

In 2024, it slipped to second place. Getting paid took the top spot.

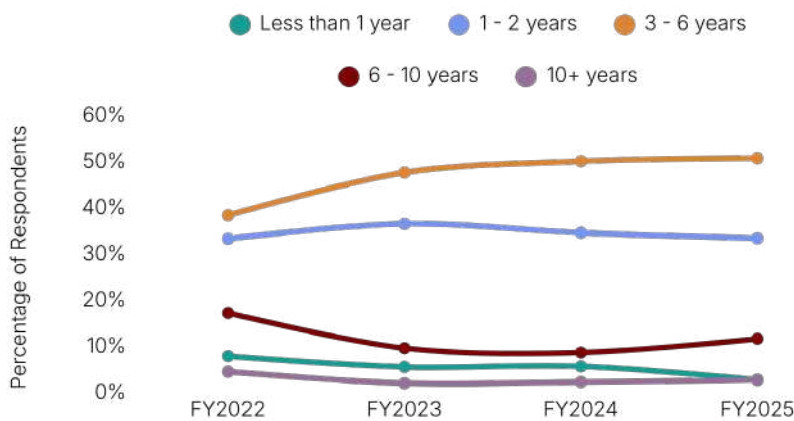
In 2025, hiring concerns continue to ease. Entry-level technician tenure has improved dramatically. Wages are up. Recruiting firms are entering the picture. The industry has done the hard work of investing in its people and it is starting to show.

The Numbers Have Moved

Entry-level technician tenure is one of the clearest signals of an industry getting healthier on the hiring front. In 2022,

ENTRY-LEVEL TECHNICIAN TENURE HAS IMPROVED FROM 38.1% TO 51% OVER FOUR YEARS. THE INDUSTRY’S INVESTMENT IN ITS WORKFORCE IS PAYING OFF.

Year-over-Year: What is the Average Tenure for Entry-Level Technicians?



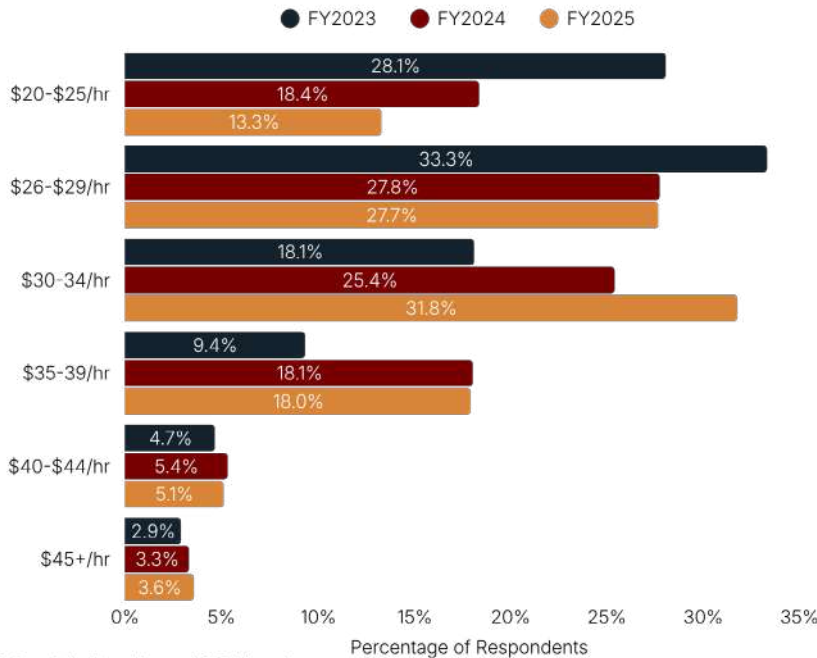
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only 38% of entry-level technicians stayed longer than a few years. In 2025, that number is 51%.

That is not a small change. That is 13 percentage points over four years - the result of wage increases, better onboarding, and companies treating frontline workers like an investment rather than a commodity.

What’s happening at the

Year-over-Year: Average Starting Wage for Supervisors and Mid-Level Management



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entry level is only part of the story. Compensation is shifting across the entire organizational chart. The data shows a growing spread between roles, with management and higher-level positions pulling further ahead while entry-level wages climb more gradually. That tension

matters. It reflects an industry that is investing more in leadership and experience, while still working to make frontline roles competitive enough to attract and retain talent in a tighter labor market.

At the same time, this distribution highlights a more

structural shift: restoration companies are becoming more layered, more professionalized, and more dependent on strong middle management than they were even a few years ago. For business owners, this isn't just a wage conversation. It's an organizational one. The companies that get this balance right of investing in both the front lines and the leadership pipeline will be the ones best positioned to scale sustainably.

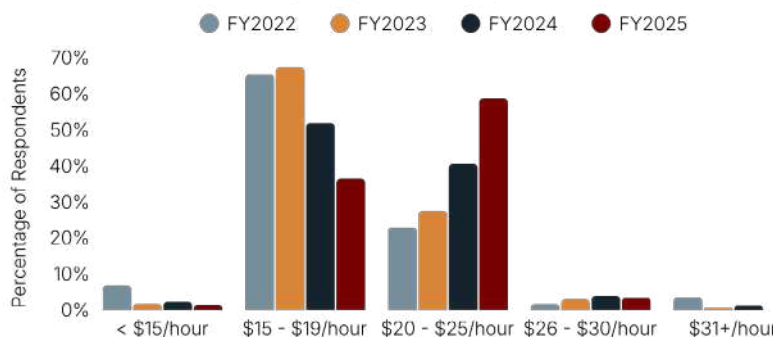
Why It Got Easier

The 2024 report identified that companies that paid more got to keep people longer. The correlation between starting wage and worker tenure was clear, and the industry responded. Over the past two years, wages have risen across the board from entry level to management.

More than 40% of entry-level technicians are now earning \$20–\$25 per hour or more. In 2022, that was true for only 22% of entry-level workers.

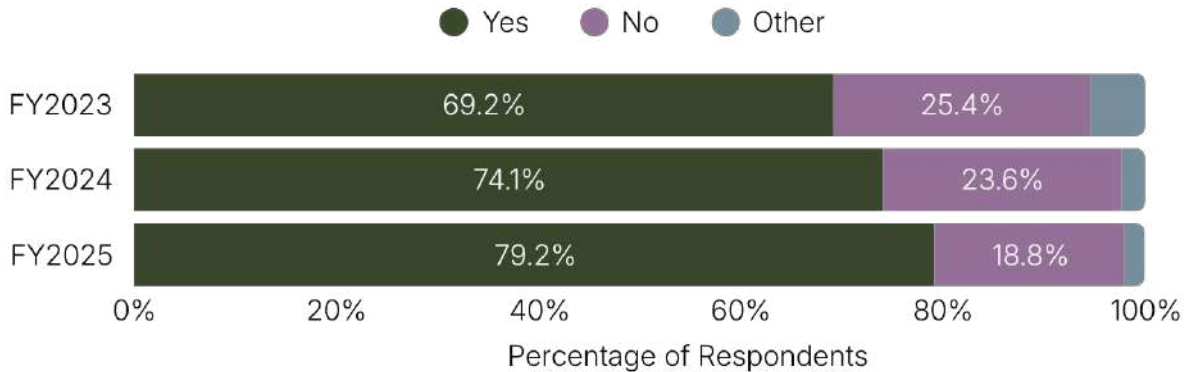
At the management level, the majority of supervisors and managers now earn between \$26 and \$34 per hour, with a growing share earning above \$35. Variable compensation like bonuses tied to performance metrics is now offered

Year-over-Year: Starting Wage for Entry-Level Technicians



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Year-over-Year: Do You Offer Supervisors and Managers Variable Compensation in Addition to Hourly Wages or Salary?



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by 79% of companies to their supervisors and managers, up from 69% in 2023.

When companies aligned their managers' incentives with the company's success, managers stayed longer and felt more invested in their company's success. Oftentimes, this simple solution (align incentives between the manager and the business) is the best solution, it just takes a while to implement.

Recruiting Firms Enter the Picture

Referrals and online postings continue to lead the way in how restorers are finding talent. However, there is a new wedge to the pie in 2025: recruiting firms are gaining a foothold. This is a meaningful signal. Industries that rely on professional recruiters to find talent are industries that have

decided talent acquisition is too important to leave to chance and too competitive to handle informally.

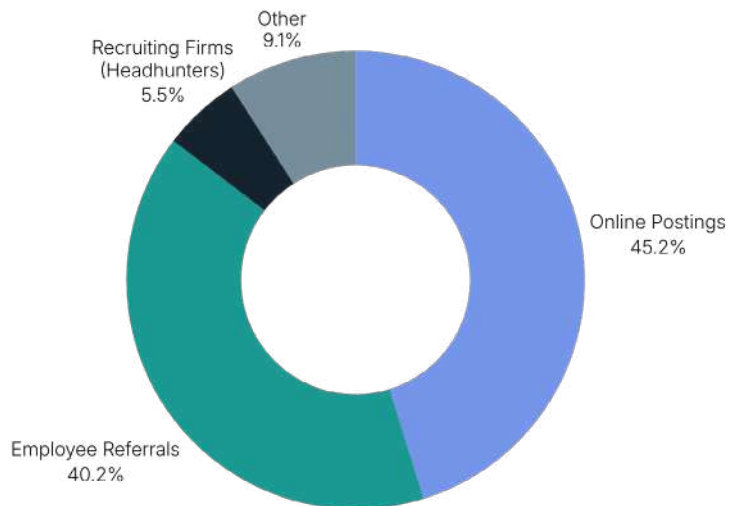
It is also a sign of professionalization. The restoration industry has historically hired through word of mouth, job boards, and referrals. The emergence of dedicated recruiting support suggests that

at least some companies have decided that approach isn't enough anymore.

Hiring Is Easier, but It is Not Easy

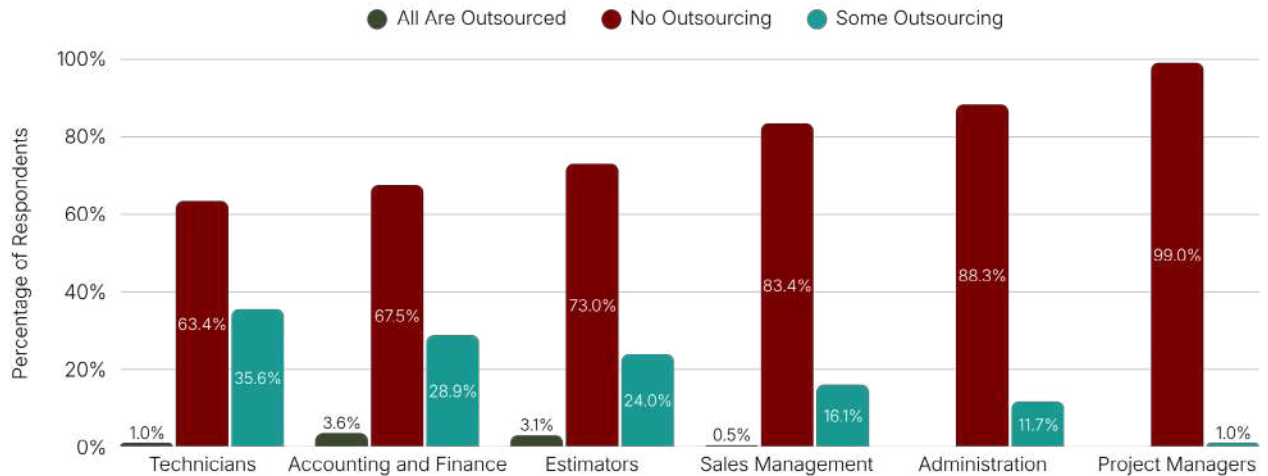
None of this means hiring is solved. Companies are still investing significant time and money in finding and keeping good people. The cost of turnover, estimated at

Sourcing New Staff in 2025



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Most Outsourced Roles by Restoration Companies



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\$10,000–\$15,000 per hire in trade service industries, has not gone away.

But the trend lines are moving in the right direction. For an industry that was gen-

uinely struggling to staff itself three years ago, the 2025 data represents real progress. Companies that invested in wages, variable comp, and better onboarding are seeing the return.

Companies that didn't are still fighting the same battles.

It is also worth a little bit of a sidebar here as well to note that more companies are outsourcing certain roles.

THERE ARE TWO TYPES OF RESTORATION COMPANIES

Techs call PMs at 2am
 New hires shadow for weeks
 SOPs collect dust in old binders
 No english? No opportunities
 Managers answer questions all day

Techs consult trusted AI at 2am
 New hires are field ready in days
 SOPs on every tech's phone
 Every language thrives
 Managers actually...manage

LEARN MORE



How do I set up containment?

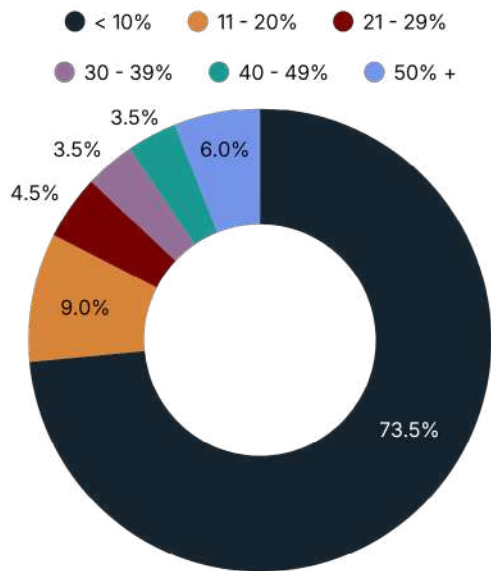


Hey Travis,

Use 6ml poly sheeting and zip poles to...

82%

What percentage of your workforce don't speak English as a first language?



Percentage of Respondents

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The ESL Workforce

Forty-three percent of restoration companies report that at least 10% of their workforce are native Spanish speakers. Six percent of companies say more than half their workforce speaks Spanish as their primary language.

Spanish-speaking workers already make up 35% of the US construction industry, and that share is expected to grow. Restoration companies that invest in multilingual training, documentation, and communication are building a competitive advantage, now and in the future. Companies that do not are allowing unnecessary friction in their own operations.

What To Do With This

If your technician tenure is still under two years on average, wages are probably part of the story.

Look at what the market is paying and be honest about where you are relative to it.

If you're not offering variable compensation to your managers, consider what you're signaling to them. Managers who win when the company wins stay longer and work harder. That's not a theory. It's in the data.

And if you haven't thought about where your next five hires are coming from, start now. The companies that built their recruiting infrastructure before they needed it are the ones that can actually grow when the work arrives.

Team Discussion Questions

1. What is our average entry-level technician tenure right now? If it's under two years, what are the top two reasons people are leaving — and have we actually asked them?
2. Pull up what we're paying entry-level techs and compare it to market rate. Are we competitive? If not, what's the cost of staying where we are versus the cost of raising wages?
3. Are our managers' bonuses tied to anything that reflects company performance — AR timelines, retention, job margins? If not, what are we incentivizing them to care about?
4. Do we have a plan for where our next five hires are coming from — referral network, job boards, recruiting firm — or are we waiting until we're desperate?
5. What percentage of our workforce speaks Spanish as a primary language? Are our training materials, safety documentation, and day-to-day communication set up to actually work for them?

CHAPTER 6

WORKER HEALTH

Key Highlights:

- 75% of restoration companies provide healthcare coverage or benefits to all staff.
- Burnout and exhaustion are on most leaders' radar, but formal policies are rare.
- Time off, vacation policies, and scheduling adjustments (like 4-day workweeks) are the most common burnout interventions.

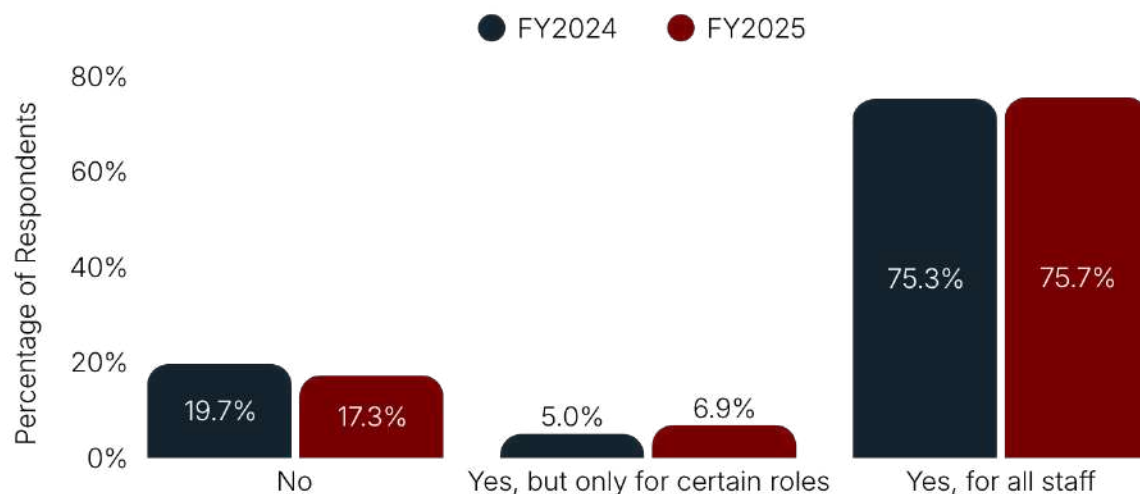
The restoration industry is a hard industry to work in. The work is physical, the hours are unpredictable, the stakes are high, and the pace does not slow down because your team is tired. CAT events do not schedule themselves around summer vacations.

For the past two years, the State of the Industry report has tracked how companies are thinking about and responding to that reality. The picture in 2025 is one of growing awareness and slow, uneven progress.

Healthcare Coverage: The Baseline

75% of restoration companies provide healthcare coverage or benefits to all staff. That number has been consistent across the past two years, and it represents a meaningful commitment from an industry that could technically get away with offering less.

The companies that do not offer benefits (roughly 20%) are not simply lacking a perk their competitors offer, they are making a recruiting decision. Yes, this is admittedly an expensive decision - and an understandable thing to forgo for smaller companies or part-time workers, but remember: In a labor market where experienced technicians have options, health benefits are often a deciding factor. The companies without them will continue to lose candidates to the companies that have them.

Year-over-Year: Healthcare & Benefits Coverage

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Year-over-Year: How Does Your Team Think About Burnout?



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Burnout: On the Radar, Not on the Calendar

Seventy-eight percent of restoration companies are now talking about burnout in some form. Only 22% say it is not a topic of conversation at all. That is genuinely encouraging that the awareness is there.

What is less encouraging is what happens after the conversation. Only 20% of companies have implemented formal, team-wide policies or practices to address burnout proactively. The majority are handling it reactively, case by case, as problems arise. Remember: burnout comes in many different forms, and may not be truly labeled as such - but burnout can look like increased mistakes on jobsites, top performers losing their spark, or more difficulty getting anyone to agree to step up when on call.

In an industry where the busiest periods are precisely the ones most likely to cause burnout, reactive management is not enough. By the time a CAT event is over and the team is exhausted, the damage is already done.

What Companies Are Doing

Among companies that have taken steps to address burnout, the most common approaches fall into four categories.

1. Time off and scheduling: Overtime limits, mandatory PTO, enforced vacations during slow seasons, 4-day or 4.5-day workweeks, on-call rotations, and caps on consecutive days worked.
2. Support and wellness programs: Access to counseling, Employee and Family Assistance Programs (EFAPs), regular 1-on-1 check-ins, and burnout

prevention training.

3. Culture and recognition: Team events, open communication norms, psychological safety, and rewards for quality work.
4. Acknowledging the gap: A significant number of restorers indicated that no specific steps have been taken or that burnout has not yet been identified as a formal problem at their company.

What To Do With This

If you offer healthcare benefits to all staff, good. If you don't, understand what that costs you in recruiting before you decide it's saving you money.

If you are talking about burnout but don't have a policy, write one. It doesn't have to be complicated. A clear limit on consecutive days worked, a PTO policy that people can actually use, and a manager who has explicit permission to send people home when they need it — that is a policy. Start there.

And if you received an acquisition call last year and haven't thought through how you would respond if it got serious: this is a good time to think through it. Not because you have to sell, but because knowing your answer before

WE ASKED

RELATED TO WORKPLACE BURNOUT OR EXHAUSTION, WHAT STEPS OR INITIATIVES HAVE YOU TAKEN, IF ANY?

YOU SAID

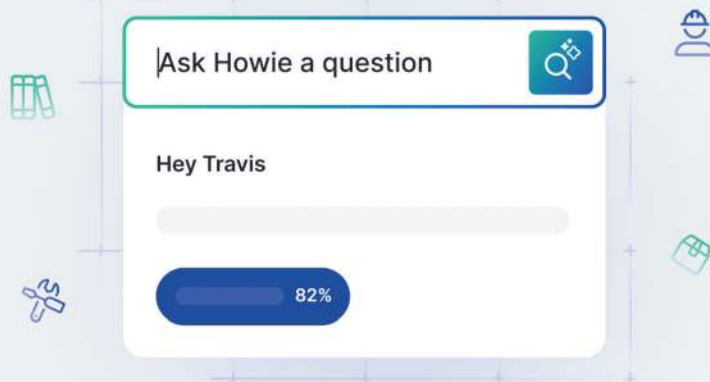
- “14-hour Rule (no one can work more than 14 hours in a day w/o exec approval) Gifted PTO based on certain overtime thresholds. Higher than industry average supervisor to employee ratio - allowing for regular 1-1s, coaching and encouragement. Regular Training - Training Tuesdays so everyone can level up. Regular all team and all company recognition celebrations.”
- “We work closely with staff we recognize symptoms in to lighten work load in heavy situations. We have provided mini vacations and unplug opportunities for those that need them. We work together to ensure everyone has family time. We encourage every employee to make time to attend children’s activities, be home at 5 for dinner, take time for Reunions, etc.”
- “Annual theme of Cultivating Growth with monthly resources dedicated to personal, financial, spiritual, and professional health and wellness distributed and discussed during monthly meeting. Emphasizing easy, simple, ways to be a healthy, well-rounded human.”
- “We added an Employee and Family Assistance Program (EFAP) to our benefit offerings which includes free counselling and coaching.”

you’re asked makes you a better negotiator.

Team Discussion Questions

1. Do we offer healthcare benefits to all staff? If not, do we know how many candidates we’ve lost in the last year to competitors who do?
2. When was the last time a leader on our team had a genuine, one-on-one conversation with a frontline worker about how they’re doing — not about the job, but about them personally?
3. Do we have a written policy on burnout prevention — consecutive days worked, mandatory PTO, on-call rotation limits? If not, can we draft one in this meeting?
4. Who on our team is most at risk of burning out right now? What are we doing about it — and does that person know we’re paying attention?
5. After a major CAT event or surge period, what does our team’s recovery look like? Is there a structured wind-down, or does everyone just keep going until the work stops?

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CHAPTER 7

MERGERS & ACQUISITIONS: INTEREST WITHOUT URGENCY

Key Highlights:

- M&A activity slowed dramatically in 2025.
- Nearly half of restoration companies are not currently interested in acquisition offers.
- Private Equity's interest in the restoration industry continues to increase.

Private equity and M&A (mergers and acquisitions) activity in the restoration indus-

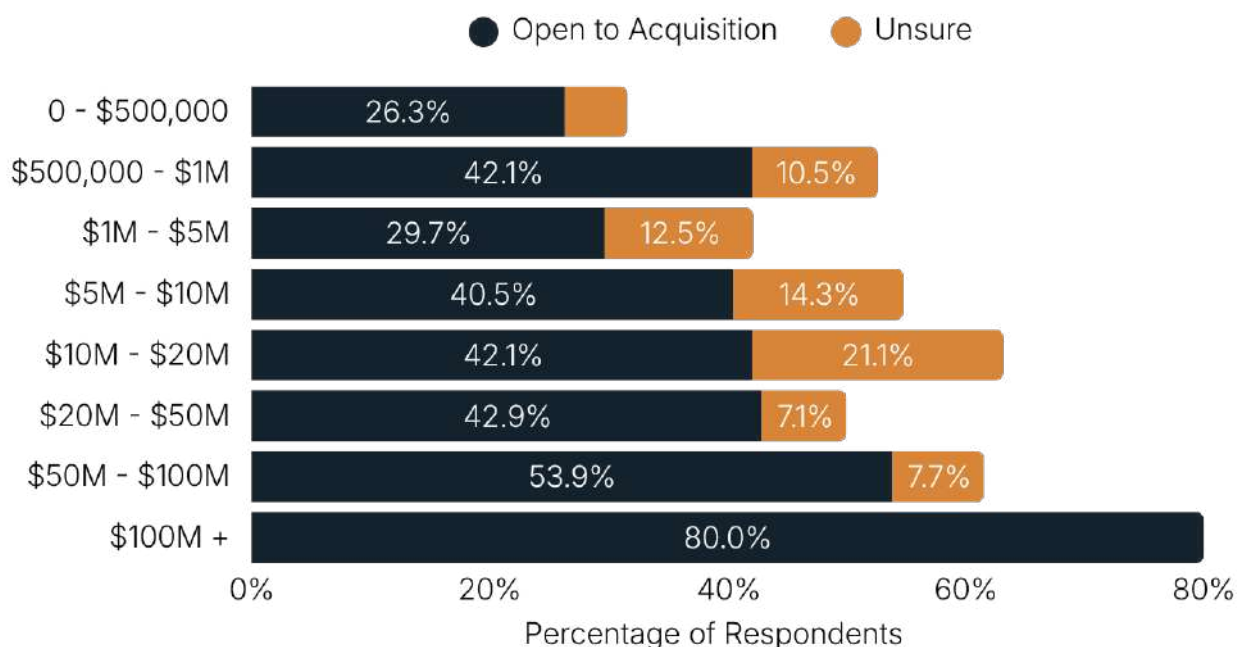
try has been a major, trending topic for four or five years now. In 2024, M&A outreach activity increased by over 10% compared to 2023. Restoration companies generating more than \$2 million in revenue were receiving regular calls from buyers.

In 2025, 47% of restoration companies say they are not currently interested in acquisition offers. Among the remaining

53%, openness varies significantly by company size - larger companies tend to be more receptive to conversations, while smaller companies are more likely to be either uninterested or not yet on anyone's radar.

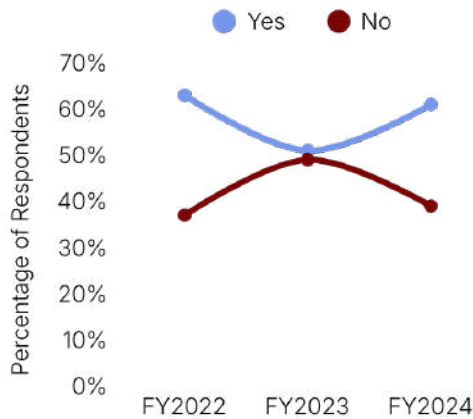
The M&A environment has not cooled. The buyers are still there. But sellers aren't in a hurry.

Merger and Acquisition Interest by Revenue in FY2025



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Year-over-Year: Has Your Company Been Approached by a Potential Buyer in the Last 24 Months?



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Team Discussion Questions

1. If a serious acquisition offer came in tomorrow, do we have a clear answer ready — and is that answer based on a real valuation of our business or just a gut feeling?
2. Have we received outreach from buyers in the past 12 months? If yes, how did we handle it, and was that the right response?
3. For those not interested in selling: what are we building toward instead, and what's our 5-year ownership plan?
4. PE interest in restoration is growing — does our team understand what that means for the industry, and how does it affect our recruiting, retention, and competitive positioning?
5. If we were going to make ourselves more attractive to a future buyer (even if we don't plan to sell), what are the top two or three things we'd need to fix or build in the next year?

WE ASKED

HOW HAS CONSOLIDATION IN THE RESTORATION INDUSTRY AFFECTED YOUR BUSINESS TO DATE?

YOU SAID

- “Increased pressure on pricing or margins.”
- “Private equity has helped us because the businesses that sold are struggling since their M&A which has helped us grow immensely.”
- “Created additional shortages of quality work force people.”
- “More turnover/layoffs in acquired companies = increased revenue for us.”

CHAPTER 8

BEST IN CLASS VENDORS

Key Highlights:

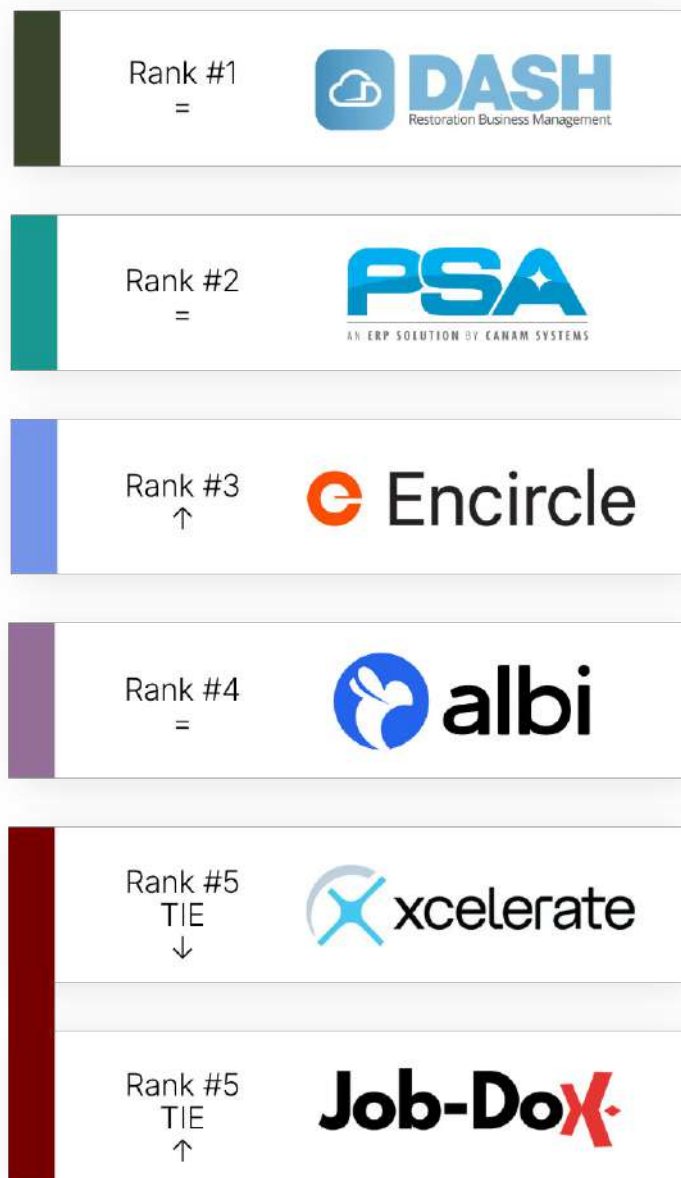
- There remain some dominant players in the tech vendor space.
- One industry conference leads above the rest by a clear margin.
- Best ROI is becoming a competitive category.

Every year, the State of the Industry survey asks restorers which tools, vendors, consultants, and conferences you actually recommend to others. Not what you've heard about. Not what someone pitched you at a trade show. What you use, trust, and keep coming back to.

In 2025, a few names held their positions at the top. A few moved. And a few showed up for the first time in meaningful numbers. Here is where the industry stands.

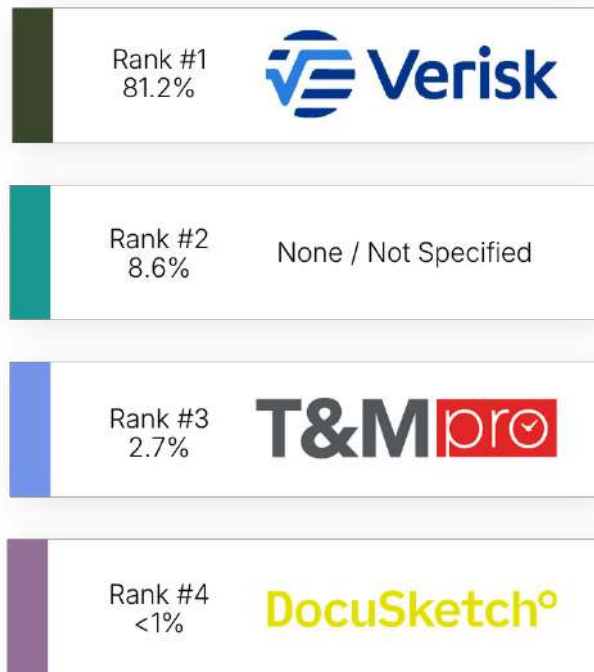
Job Management Software

DASH holds the top spot as most recommended job management software - holding strong in that spot every year since this survey began in 2022. PSA follows, and Encircle rounds out the top three.

Best Job Management Software of FY2025

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Best Estimating Software of FY2025



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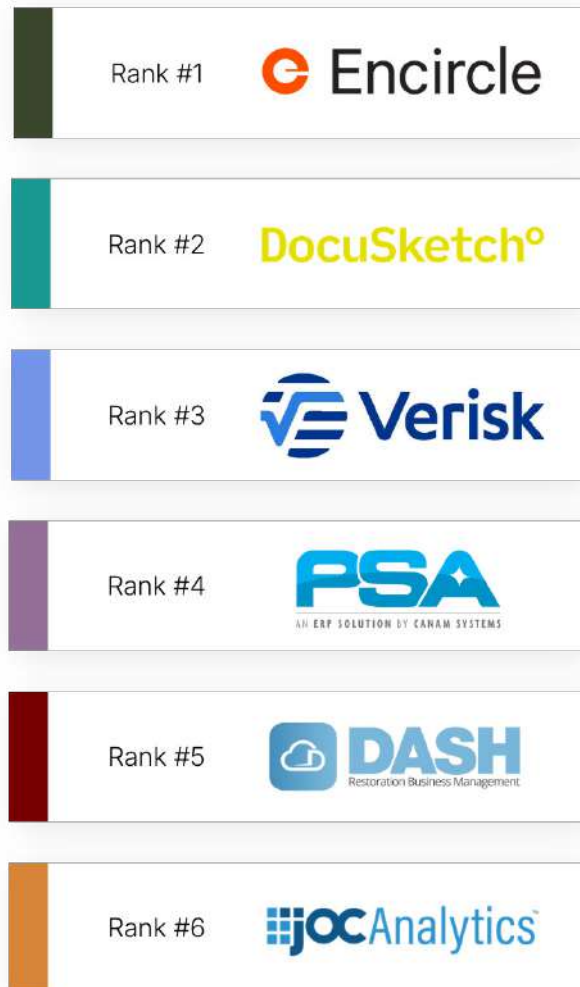
Estimating Software

Xactimate's dominance in estimating software remains a fact, and there is no close second. The only other estimating platform picking up mentions was T&M Pro, which is getting a large push, especially among companies leaning into commercial work.

Best Return on Investment

This is the category that tends to generate the most discussion and the most useful signal. When restorers name the best ROI tool, they are telling you what is actually moving the needle in their business, not just what they are paying for. As margins have tightened, restorers are quicker than ever to kick non-performing tools to the curb. Those remaining are clearly

Best Return on Investment (ROI) of FY2025



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rising above the rest. This category is getting more competitive compared to previous years, an encouraging sign that many vendors are taking their value offering seriously.

Equipment Vendors

This section of the survey admittedly has a bit of a mixed bag of results - with equipment vendors and distributors often mentioned together.

Top Equipment Vendors and Suppliers of FY2025

Rank #1	
Rank #2 TIE	
Rank #2 TIE	
Rank #4	
Rank #5	

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Consultants

Violand Management Group is the clear leader in consulting - with more than 4x more mentions than the next closest, Floodlight Consulting Group. The consulting space remains relatively unconsolidated, with a long tail of individual advisors and smaller firms.

Conferences

RIA Conference dominates the conference category with nearly five times the next closest event. If you are trying to reach restoration leaders in one place, RIA is the answer.

Best Conferences of FY2025





Rank #1	
Rank #2 TIE	
Rank #2 TIE	
Rank #4 TIE	
Rank #4 TIE	
Rank #4 TIE	

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Top Carriers

For the first time, we also asked about preferred carriers - which helps pinpoint who is best to work with, has the best communication, pays on claims the fastest, etc.

Best Carriers of FY2025

Rank #1	
Rank #2 TIE	
Rank #2 TIE	
Rank #4	

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Team Discussion Questions

1. Look at every software subscription we're paying for — which ones can we point to a measurable ROI on? Which ones are we keeping out of habit?
2. Are we using Xactimate to its full capability, or are we leaving money on the table through underuse of features our estimators haven't been trained on?
3. Which conferences did our leadership team attend last year? Did we come back with specific action items — and did we follow through on any of them?
4. We now have data on which carriers pay fastest and communicate best. Are we making intentional decisions about which carrier work we prioritize — or do we take everything that comes in?
5. Are we investing in any form of outside consulting or coaching? If not, is that because we don't see the value, or because we haven't found the right fit?



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