



Freedonia Focus Reports  
US Collection

# Pools & Spas: United States

October 2019



**BROCHURE** CLICK TO ORDER  
**FULL REPORT** CLICK TO ORDER

[www.freedoniafocusreports.com](http://www.freedoniafocusreports.com)

# Table of Contents

---

<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>4</b>
Historical Trends	4
Key Economic Indicators	6
Consumer Insights: Accessibility	7
Consumer Insights: Ownership & Maintenance Trends	8
Consumer Insights: Affordability & Desirability	9
Legal & Regulatory Environment	10
Aesthetic & Design Trends	12
Technology & Product Innovation	14
North America Regional Outlook	15
<b>3. Segmentation &amp; Forecasts</b>	<b>17</b>
Types	17
<b>4. Industry Structure</b>	<b>20</b>
Producers & Competitive Strategies	20
<b>5. About This Report</b>	<b>22</b>
Scope	22
Sources	22
Industry Codes	23
Freedonia Methodology	23
Resources	25

# List of Tables & Figures

---

Figure 1   Key Trends in the US Pools & Spas Market, 2018 – 2023	3
Figure 2   US New Pools & Spas Sales Trends, 2008 – 2018	5
Table 1   Key Indicators for US Pools & Spas Demand, 2008 – 2023 (2012US\$ bil)	6
Figure 3   US Consumer Insights: Pool & Spa Accessibility, 2019 (% of total respondents)	7
Figure 4   US Consumer Insights: Pool & Spa Ownership Trends, 2019 (% of total respondents)	8
Table 2   US Consumer Insights: Pool & Spa Affordability & Desirability, 2019 (% of total respondents)	9
Figure 5   North America Pools & Spas in Use by Country, 2018 (%)	15
Figure 6   US Pools & Spas in Use by Type, 2008 – 2023 (mil units)	17
Table 3   US Pools & Spas in Use by Type, 2008 – 2023 (mil units)	17
Table 4   US New Pools & Spas Sales, 2008 – 2023 (000 units)	18
Figure 7   US Pools & Spas in Use by Type, 2008 – 2023 (%)	19
Table 5   US Selected Pools & Spas Producers by Product Line	20
Table 6   NAICS & SIC Codes Related to Pools & Spas	23

# About This Report

---

## Scope

This report forecasts to 2023 US pools and spas in use (in total and by each type) and total new pool and spa sales in unit terms.

To illustrate historical trends, total pools and spas in use (as well as by type) and total new pools and spas are reported at five-year intervals for 2008, 2013, and 2018.

For the purposes of this report, pools are defined as any manufactured prefabricated or modular indoor or outdoor unit intended for swimming, including:

- aboveground pools
- inground pools

Excluded from the scope of pools are inground units that are not prefabricated at the point of manufacture and whose installation requires extensive construction and landscape design and excavation activities.

Spas constitute any manufactured prefabricated or modular indoor or outdoor unit – often featuring pulsating jets – intended for soaking, therapy, relaxation, and, increasingly, swimming laps in place. Examples include:

- hot tubs
- whirlpools
- jetted lap (i.e., swim-in-place) spas

Excluded from the scope of spas are inground units that are not prefabricated at the point of manufacture, as well as whirlpool/jetted bathtubs and other sanitaryware products intended for lavatories.

Key macroeconomic indicators are also provided with quantified trends. Other various topics are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Pools & Spas: United States* (FF60119) is based on [Global Pools & Spas](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies

## About This Report

- intergovernmental and non-governmental organizations
- national consumer survey data
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 6 | NAICS & SIC Codes Related to Pools & Spas

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
221310	Water Supply & Irrigation Systems	1781	Water Well Drilling
237110	Water & Sewer Line & Related Structures Construction	4941	Water Supply
333318	Other Commercial & Service Industry Machinery Manufacturing		

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis,

## About This Report

end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

## Resources

### The Freedonia Group

*Global Pools & Spas*

### Freedonia Industry Studies

*Activated Carbon*

*Consumer Water Treatment Systems in the US*

*Global Activated Carbon*

*Global Consumer Water Treatment Systems*

*Global Filters*

*Global Membrane Separation Technologies*

*Global Nonwovens*

*Global Power Lawn & Garden Equipment*

*Global Pumps Market*

*Global Water Disinfection Equipment Market*

*Global Water Filtration Equipment Market*

*Global Water Treatment Equipment & Chemicals*

*Landscaping Products*

*Lawn & Garden Consumables*

*Lawn & Garden Robots*

*Outdoor Living Products 2019*

*Pipe: Products & Markets*

*Power Lawn & Garden Equipment*

*Recreational Boating in the US*

*Recreational Vehicles in the US*

### Freedonia Focus Reports

*Amusement Parks: United States*

*Architectural Services: United States*

*Commercial Building Construction: United States*

*Construction: United States*

*Demographics: United States*

*Housing: United States*

*Potable Water Pipe: United States*

*Recreation: United States*

*Water: United States*

### Freedonia Custom Research

### Trade Publications

*AQUA*

## About This Report

*Aquatics International Magazine*  
*Casino News Daily*  
*Euro Spa Pool News*  
*Hotel Management*  
*Hotels*  
*Italian Pool Technology*  
*Luxury Pools*  
*Pool & Spa Marketing*  
*Pool + Spa Review*  
*Recreation Management Magazine*  
*SpaRetailer*  
*SPLASH!*  
*Water Intelligence Online*  
*Water Online*  
*Water Quality Products*  
*Water Technology*  
*WaterWorld*  
*World Waterpark Magazine*

### **Agencies & Associations**

Centers for Disease Control and Prevention  
Independent Pool & Spa Service Association  
International Code Council  
Occupational Safety & Health Administration  
Pool & Hot Tub Alliance  
United Nations Comtrade  
United States Census Bureau