

Kentley Insights

2021 Market Research Report

Health Clubs

January 2021

Report: 713940

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Report Methodology

Kentley Insights is the leader in data-driven industry market research reports. This report includes extensive data sets and forecasts on the Health Clubs industry, which will provide you with key insights and benchmarks to create a broad and in-depth diagnostic and understanding of any company in the industry.

For this report, the core data is sourced from comprehensive business surveys filled out by companies in the Health Clubs industry. Our analysts create the industry forecasts utilizing historical trends, industry dynamics, econometrics, and macroeconomic trends.

Industry Definition

Health Clubs

The Health Clubs industry includes companies primarily engaged in operating fitness and recreational sports facilities featuring exercise and other active physical fitness conditioning or recreational sports activities, such as swimming, skating, or racquet sports.

Industry Examples

Aerobic dance centers : Athletic clubs, physical fitness facilities : Body building studios, physical fitness : Exercise centers : Fitness centers : Gymnasiums : Health club, physical fitness : Health spas (without lodging), physical fitness : Health studio, physical fitness : Ice skating rinks : Physical fitness centers : Physical fitness studio : Racquetball clubs : Rinks, ice or roller skating : Roller skating rinks : Skating rinks, ice or roller : Spas, fitness (without lodging) : Sports clubs, physical fitness facilities : Squash clubs : Strength development centers : Swimming pools : Tennis clubs : Wave pools : Weight training centers

Industry Snapshot - Revenue & Growth

Below is the revenue and growth snapshot for the Health Clubs industry, covering industry size, growth, forecasts, revenue per company, product line concentration, pricing, sales per capita, and sales per location, and benchmark how many of these metrics compare to the industries within the service sector.

Overall Industry Size

The overall 2020 revenue for the Health Clubs industry was \$29.0 billion. The industry is above average in industry size, ranking in the top 40% of service industries in terms of size.

Overall Industry Growth

Over the past 3 years, industry revenue have been shrinking at an annual rate of -4.3% per year. This growth rate lags the -0.7% average for service industries and ranks it in the bottom 40% of all service industries.

Overall Industry Growth Forecast

Given the macroeconomic climate and industry dynamics, the forecasted industry revenue growth rate for the next 5 years is 5% per year for the Health Clubs industry.

Revenue per Company

In 2020, the average revenue per company for the industry was approximately \$1.0 million, which declined at a -3.6% annual rate over the past 3 years.

Product Line Concentration

In the Health Clubs industry, the top 3 product lines make up 77% of revenue, which ranks in the bottom 40% of service industries.

Pricing & Inflation

From 2019 to 2020, price inflation for the industry was -1.6%. While over the past 5 years, inflation has averaged -0.1% per year.

Sales per Capita

For the Health Clubs industry, Massachusetts has the highest sales per capita at \$152. This is 36% higher than the average \$112 per capita across the U.S.

Sales per Location

For the industry, New York has the highest sales per location at \$1.6 million, which is 57% higher than the U.S. average of \$1.0 million in sales per location.

Industry Snapshot - Costs, Capital & Profit

Below is an industry snapshot on operating expenses, employee productivity, payroll, job categorization, profitability, and relevant benchmarks.

Operating Expenses

In 2020, the operating expenses as a percent of revenue for the Health Clubs industry was 84.5%, and over the past 3-Years total operating expenses for the industry grew at -4.9% per year.

Operating Expense Breakdown

The breakdown of operating expenses for the industry is as follows: 42% for employee expenses, 11% for property expenses, 17.3% for equipment expenses, 1.3% for IT expenses, 10.8% for miscellaneous expenses, while 17.6% was spent on other operating expenses.

State Population per Industry Employee

Massachusetts has the least amount of population per industry employee within the Health Clubs industry, with 270 people in the state per industry employee, which is 0.5% of the U.S. average.

Employee Productivity

For the Health Clubs industry, in 2020 the sales per employee declined -9.9% over 2019 to \$44,439, which ranks the industry in the bottom 20% of service industries.

Payroll per Employee

In 2020, payroll per employee equaled \$14,186 for the industry, which ranks it in the top 20% of service industries. Payroll per employee has grown at an annual rate of 1.1% over the past 3 years.

Payroll by State

Hawaii is the highest paying state in the Health Clubs industry, with a payroll per employee of \$19,841, which is 36.9% higher than the U.S. average.

Job Categorization

The jobs breakdown in the Health Clubs industry is as follows: 16.1% of the jobs are in management and finance, 71.1% of the jobs are in sales, service and marketing, while 12.9% of the jobs are in operations and technology.

Profitability

65% of Companies in the Health Clubs industry are profitable, with an average net income of 7.6% of revenue, which ranks the industry in the bottom 40% of service industries.

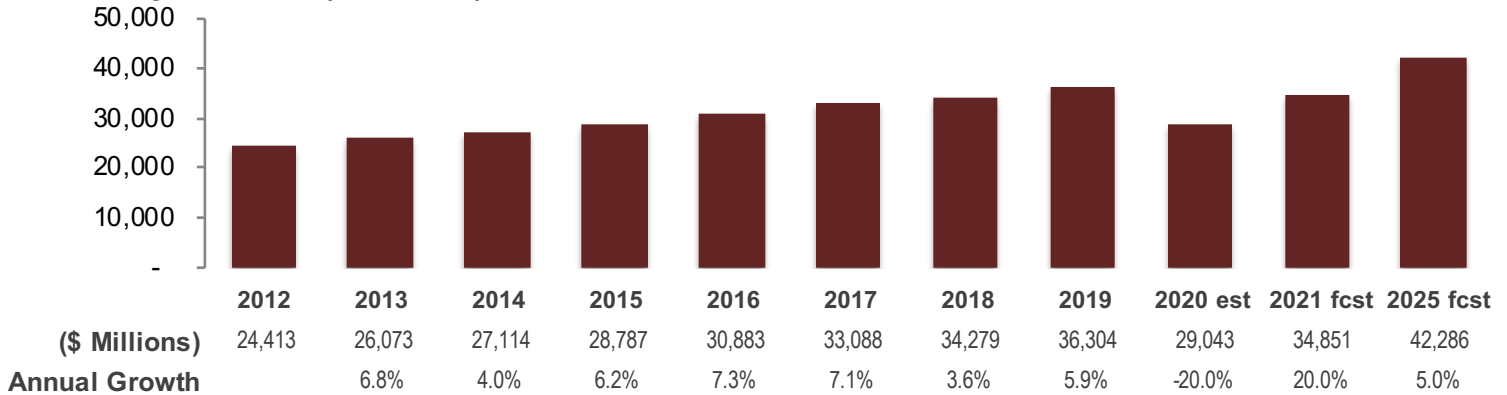
Section One

Revenue & Growth Benchmarks

Industry Growth Details

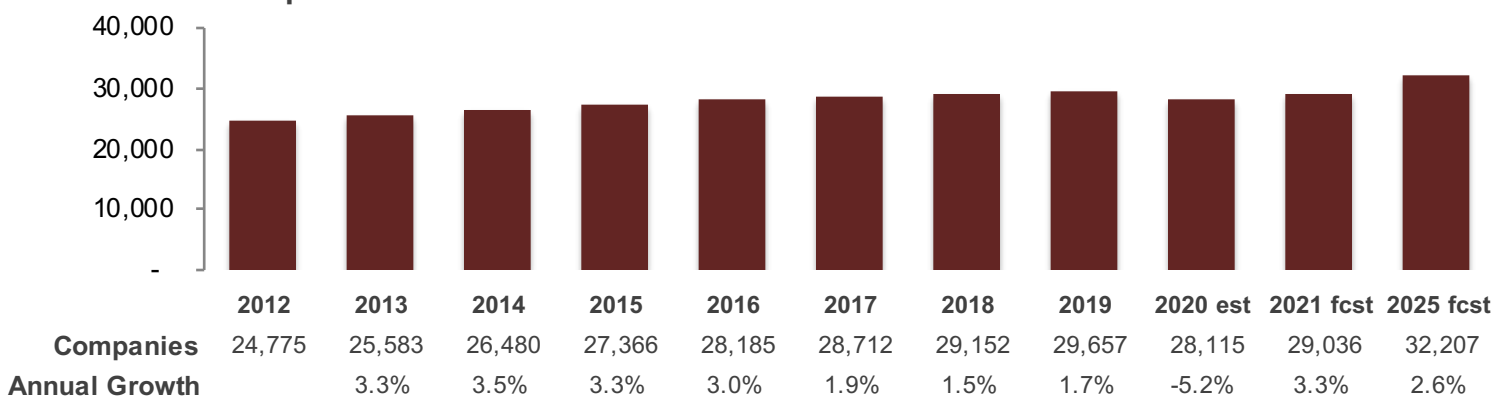
To get a macro level view of the Health Clubs industry, below are the historical details and industry growth forecasts for total industry revenue, number of companies, and number of locations.

Industry Revenue (\$ Millions)



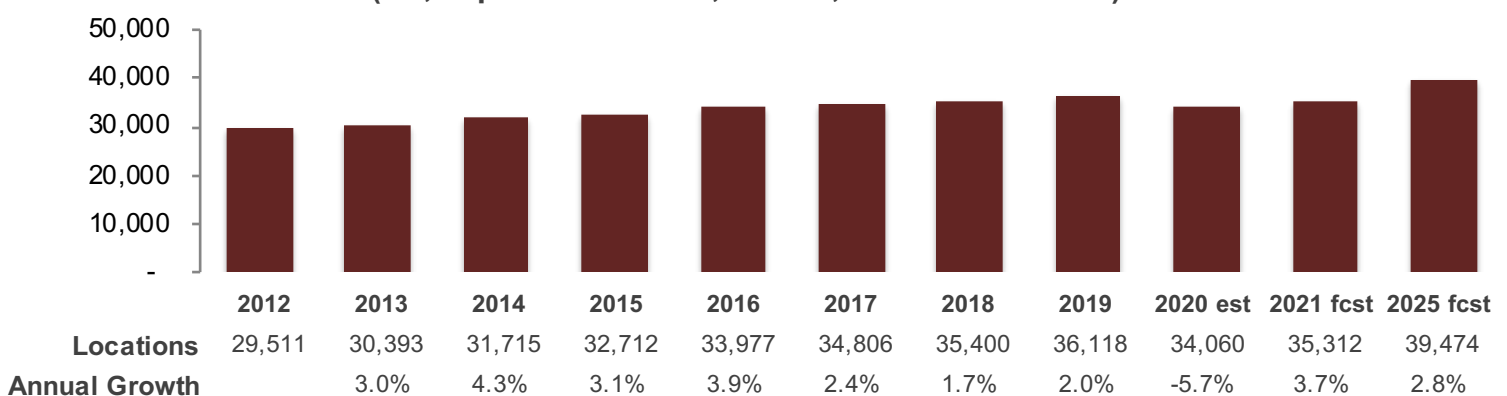
Compound Annual Growth Rate **-4.3%** 3-Year **0.2%** 5-Year

Number of Companies



Compound Annual Growth Rate **-0.7%** 3-Year **0.5%** 5-Year

Number of Locations (i.e., separate facilities, offices, or retail locations)

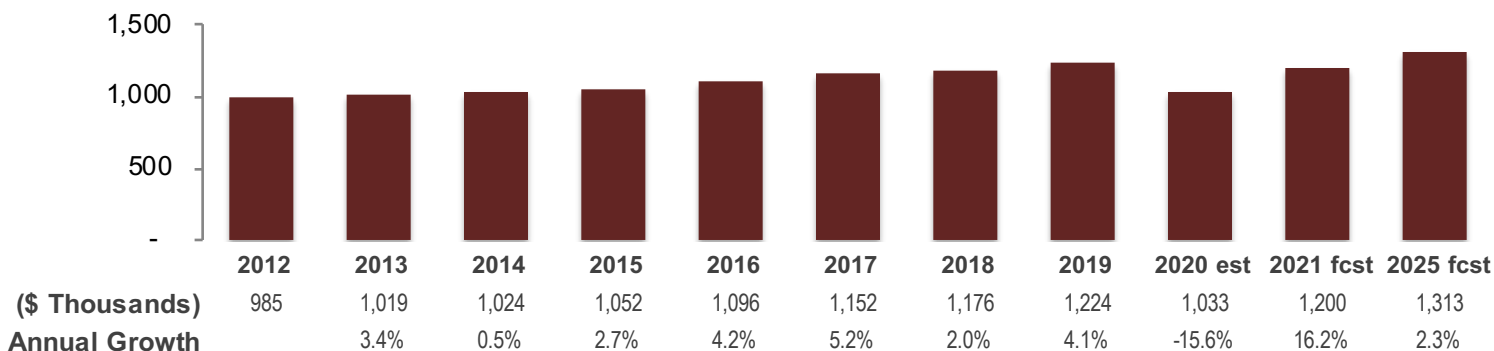


Compound Annual Growth Rate **-0.7%** 3-Year **0.8%** 5-Year

Growth Benchmarks

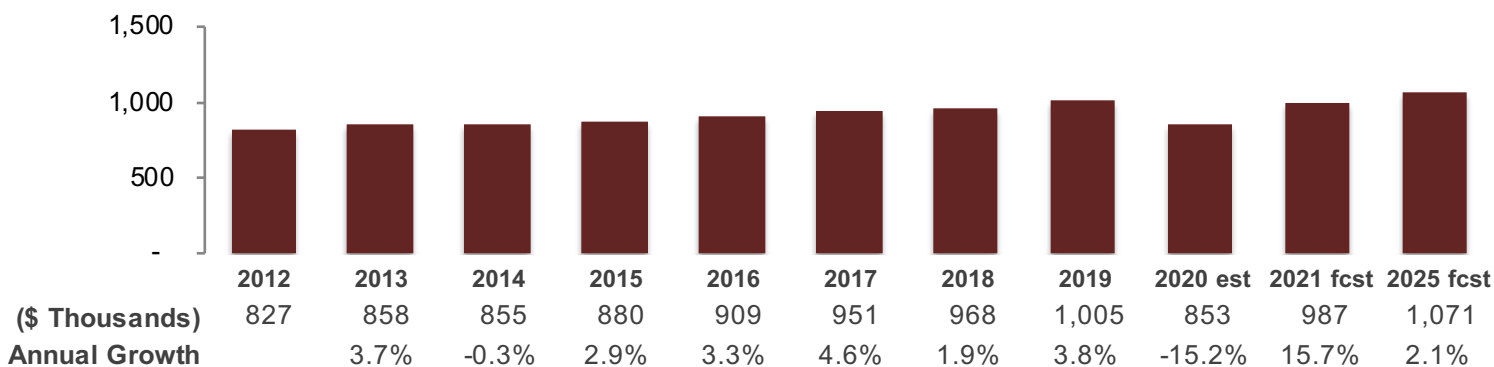
Below are the normalized growth benchmarks for the Health Clubs industry, including revenue per company, revenue per location, and locations per company. These metrics are typically better to use to benchmark a company's performance, since they normalize for company and location growth.

Revenue per Company (\$ Thousands)



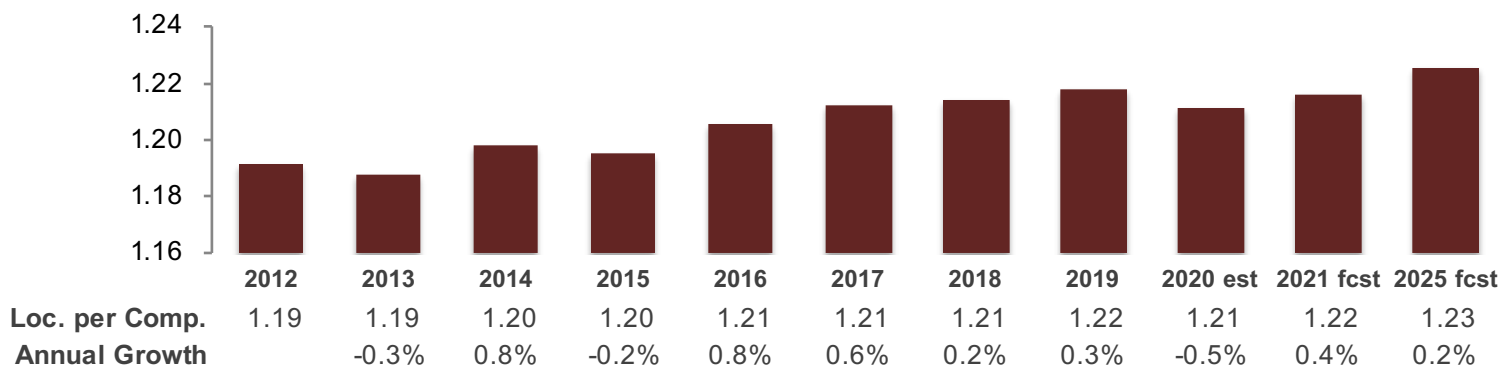
Compound Annual Growth Rate **-3.6%** 3-Year **-0.4%** 5-Year

Revenue per Location (\$ Thousands)



Compound Annual Growth Rate **-3.6%** 3-Year **-0.6%** 5-Year

Locations per Company

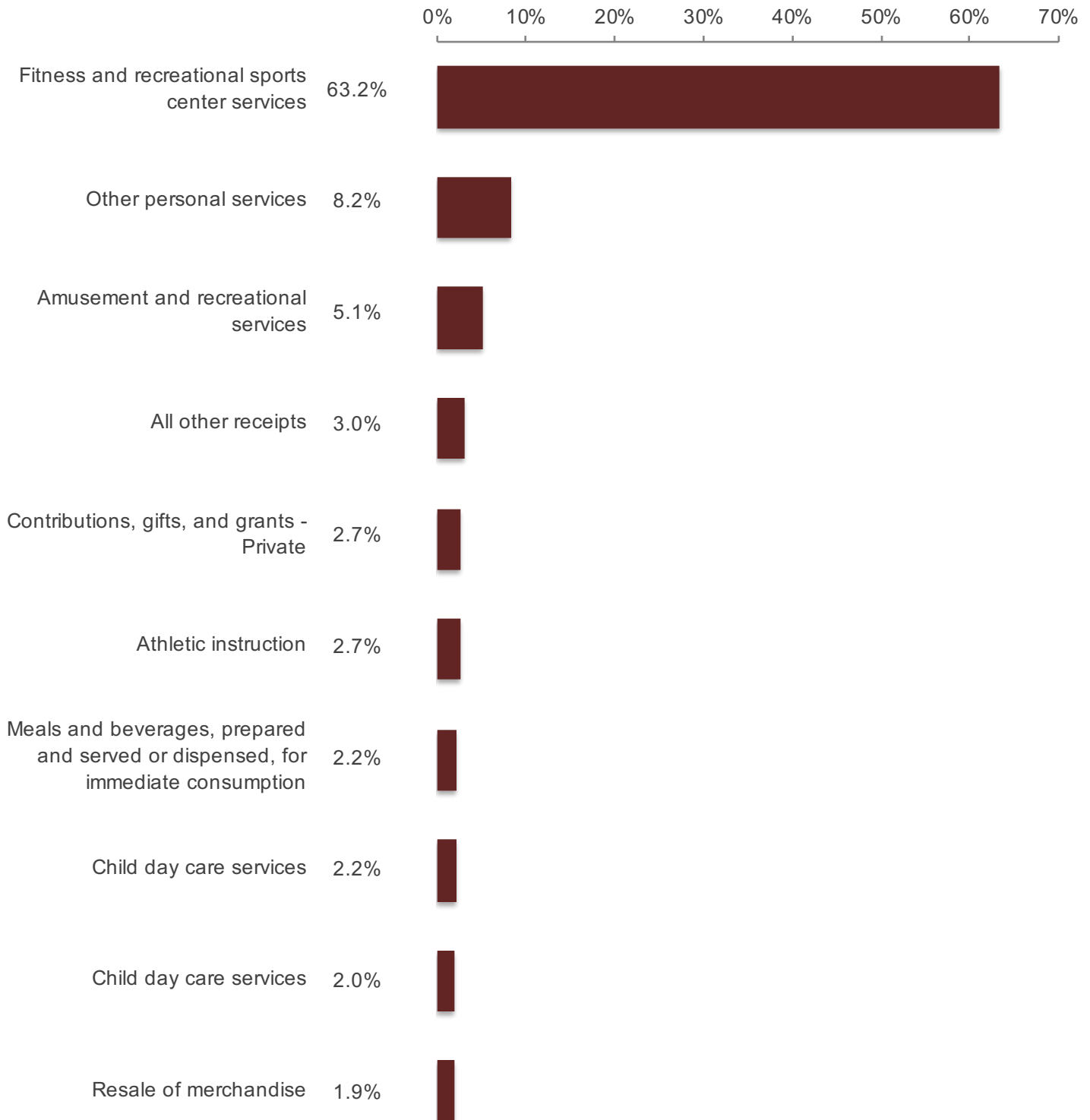


Compound Annual Growth Rate **0.0%** 3-Year **0.3%** 5-Year

Breakdown of Top Product Lines

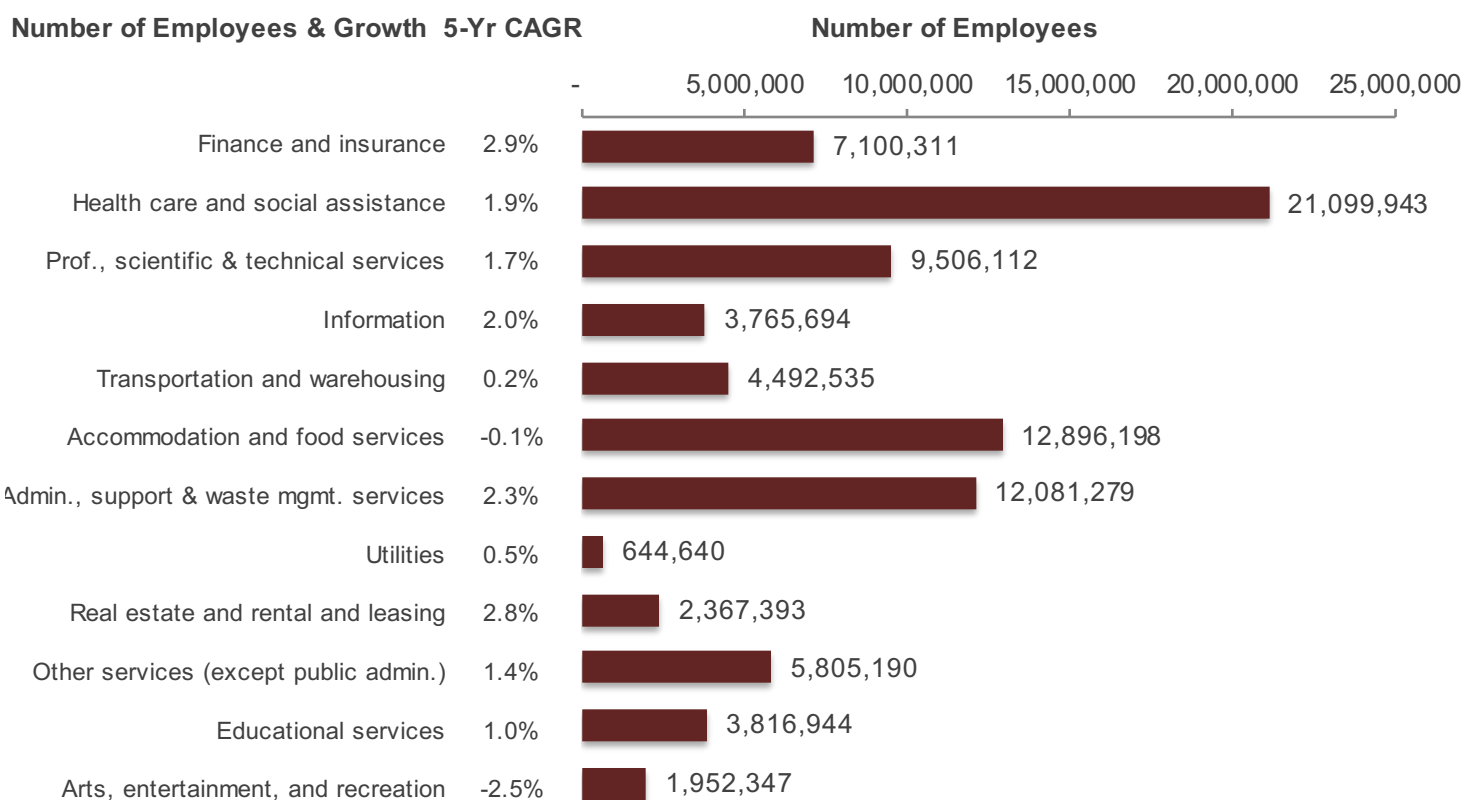
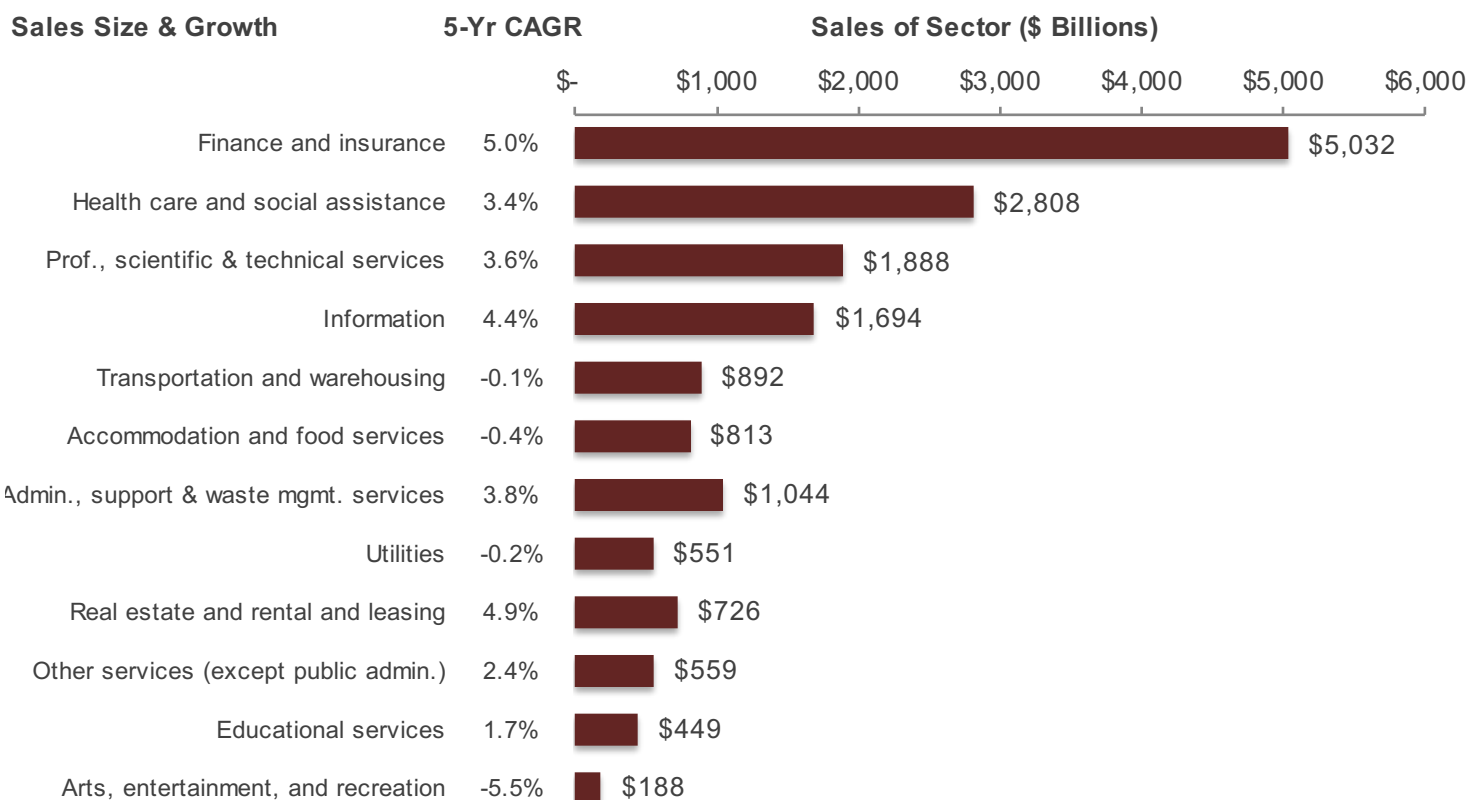
Below represents Health Clubs industry sales as a percentage of the top product lines, which is used to highlight potential growth opportunities, strengths, and weaknesses.

Breakdown of Sales by Top Product Lines (%) Health Clubs



Services Sector Growth

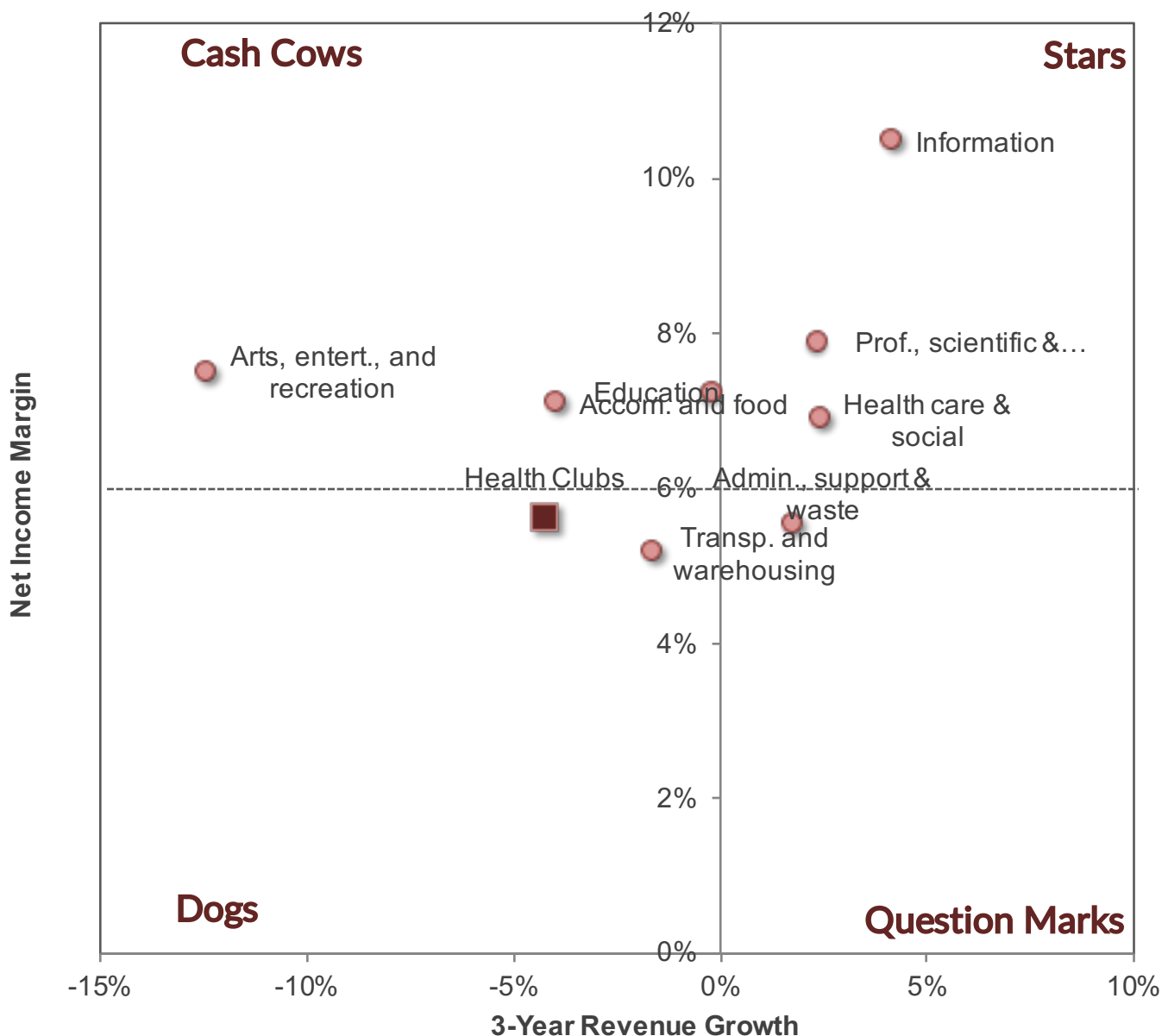
Below is the size and growth of all of the major service subsectors, which is typically utilized to understand how an industry is performing against the macro economy.



Income vs. Revenue Growth Matrix

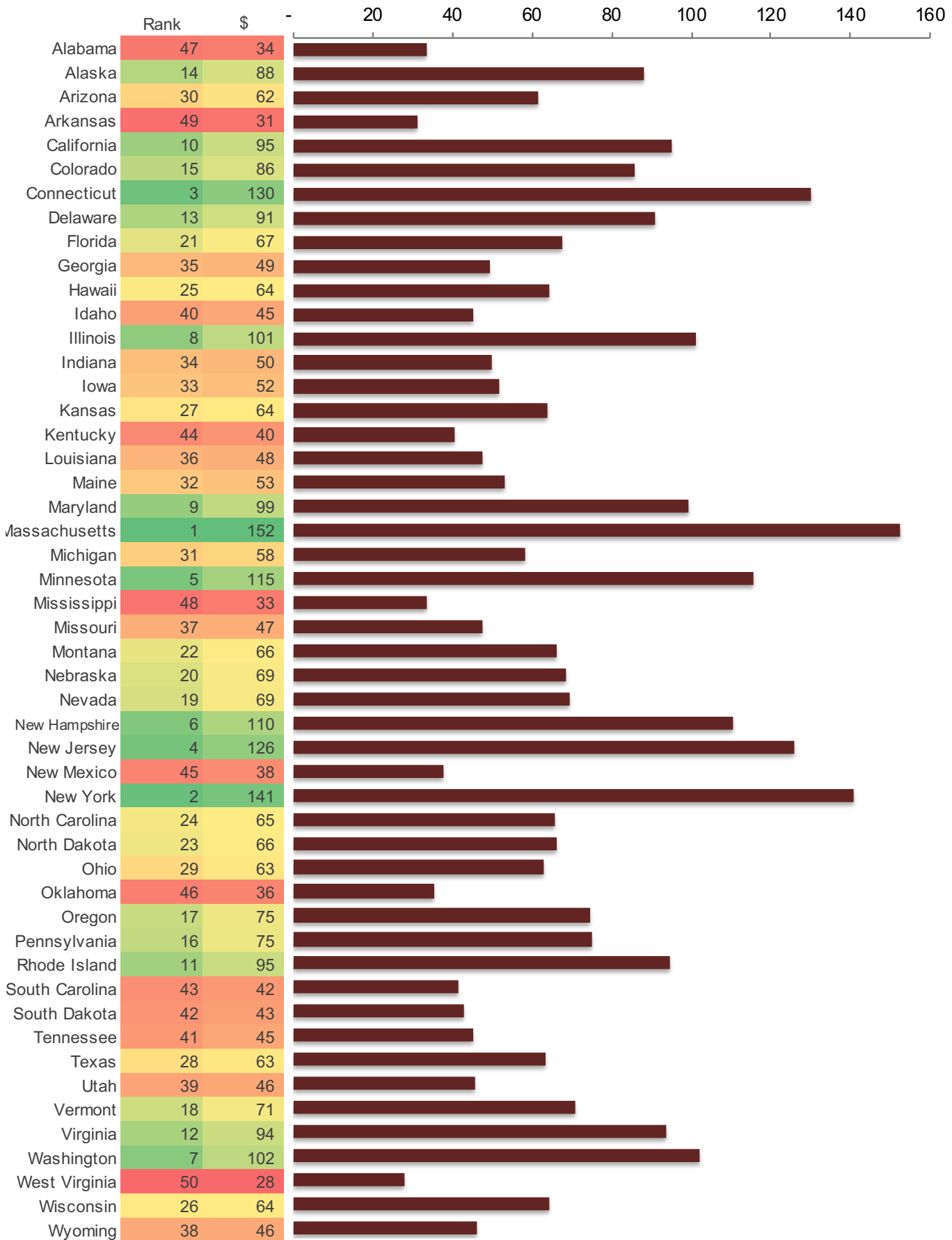
Similar to the famous BCG Matrix, though substituting net income margin for relative market share and taking it to the industry level, the Income vs. Revenue Growth Matrix is an insightful tool to create context for an industry and companies. Where is your industry on the matrix? And, more importantly, where does your company fall on the matrix?

Industries which can generate high net income margin and high revenue growth are known as the Star industries, which often attract higher levels of competition chasing the growth. While, those that generate low net income margin and low revenue growth are known as the Dogs. Often, Dog industries are very mature, and growth comes from consolidation and driving costs out of the business. Industries with high net income margin and low revenue growth are Cash Cows, which typically are more mature and have less overall investment, but have nice industry dynamics to protect the margins of the industry. While Question Mark industries are those that have high revenue growth, but low net income margin. Companies in Question Mark industries, which can drive competitive differentiation and a higher net income margin, can often realize significant profit growth.



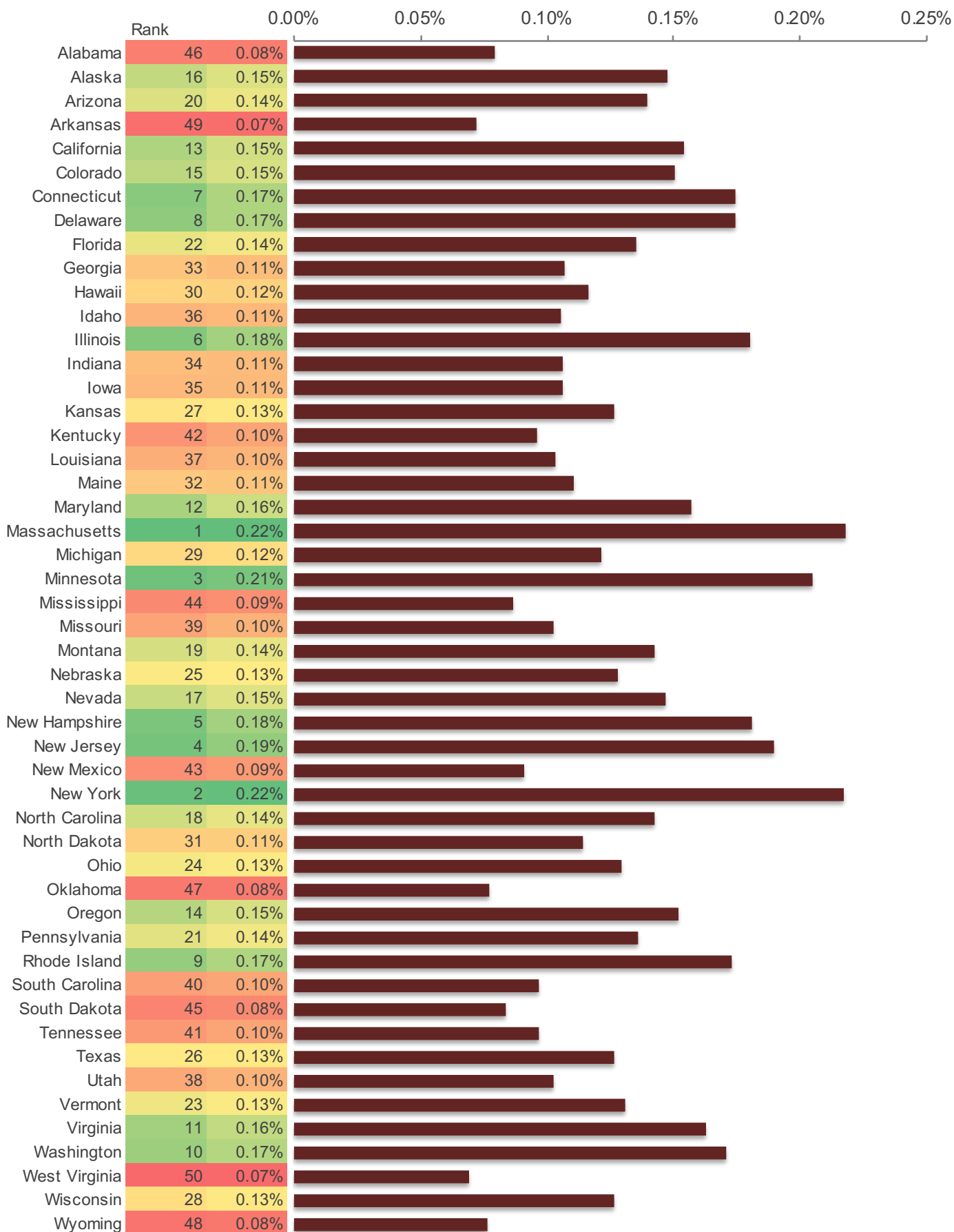
Sales per Capita by State

Below is industry sales per capita by state, which is useful to understand the total market potential by state. The metric is enhanced when compared to the sales per location in each state. When it states "no data", there wasn't a sufficient sample size of data for the state.



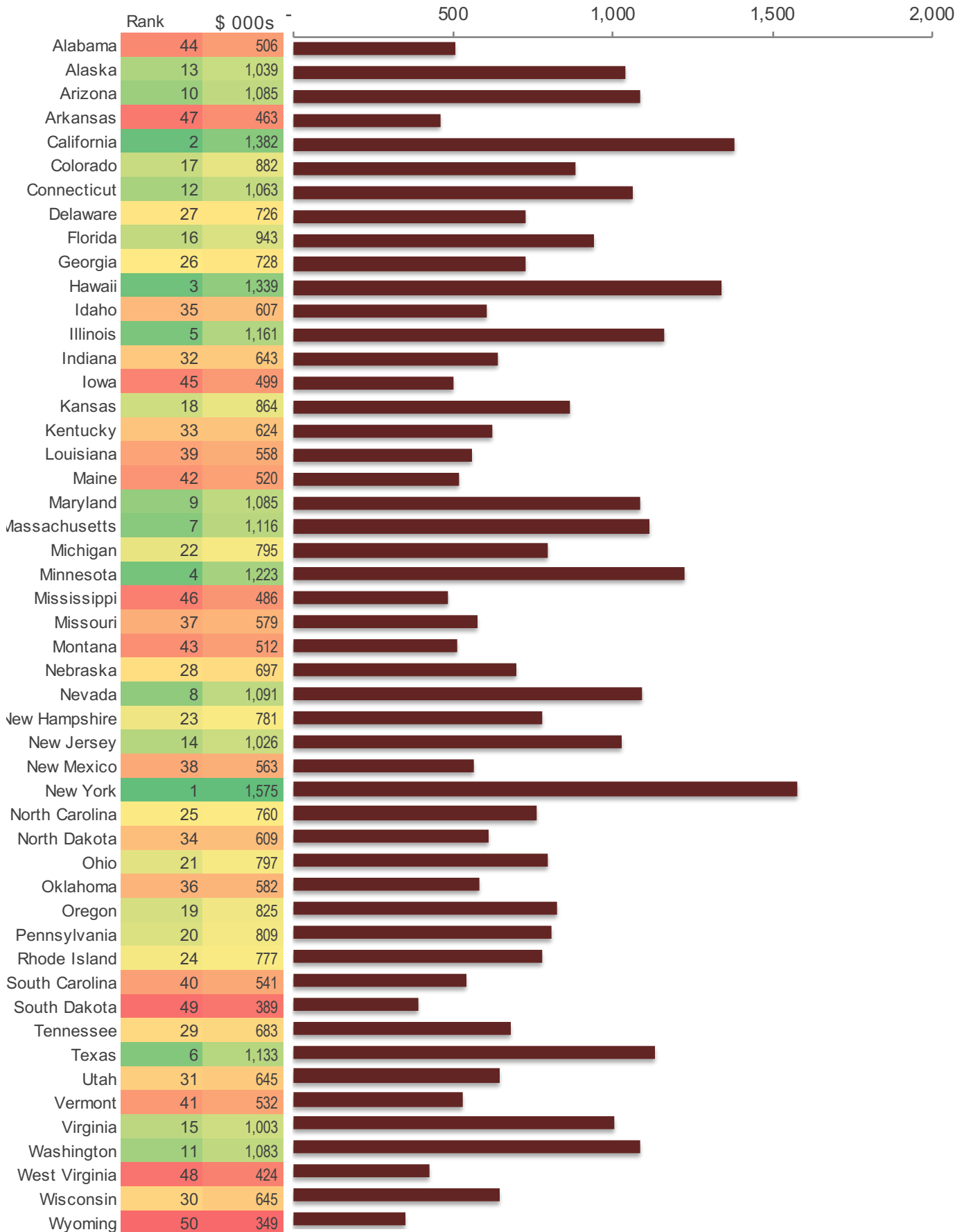
Sales as a Percent of Income by State

Sales as a percent of income helps highlight the consumption differences by state. When it states "no data", there wasn't a sufficient sample size of data for the state.



Sales per Location by State

Sales per location highlights the competitive intensity of a state. Those states with really high sales per location, will most likely face increasing competition. While those with low sales per location will often be consolidated to drive cost and capital efficiencies. "No data" means there wasn't a sufficient sample size of data for the state.

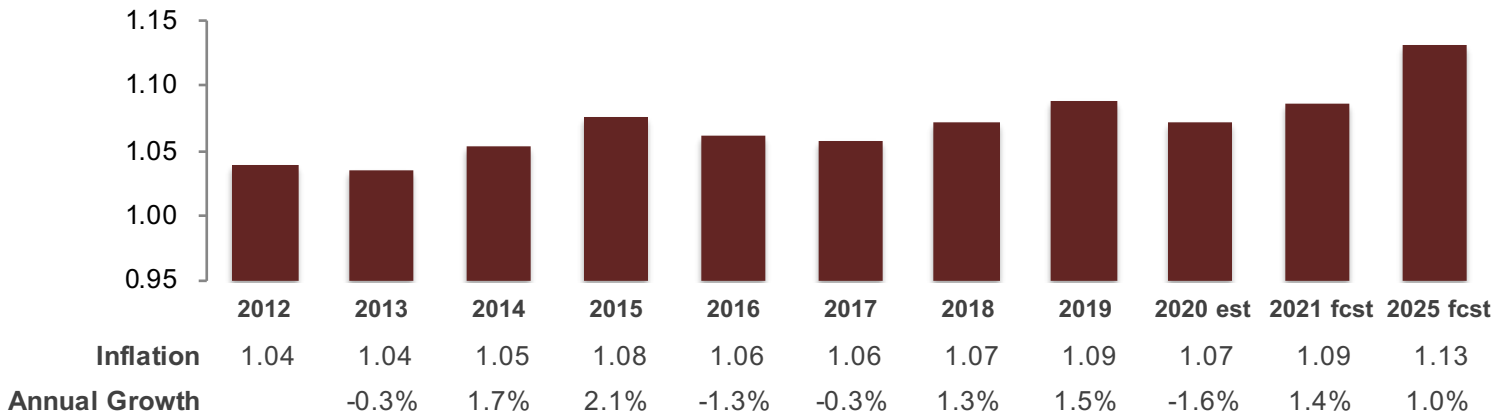


Pricing & Inflation

Understanding the pricing and inflation dynamics of an industry is critical to help inform the pricing decisions of a company. Below is the historical and forecasted inflation of the industry, and the seasonality of inflation over the past 4 years.

Health Clubs Industry Inflation

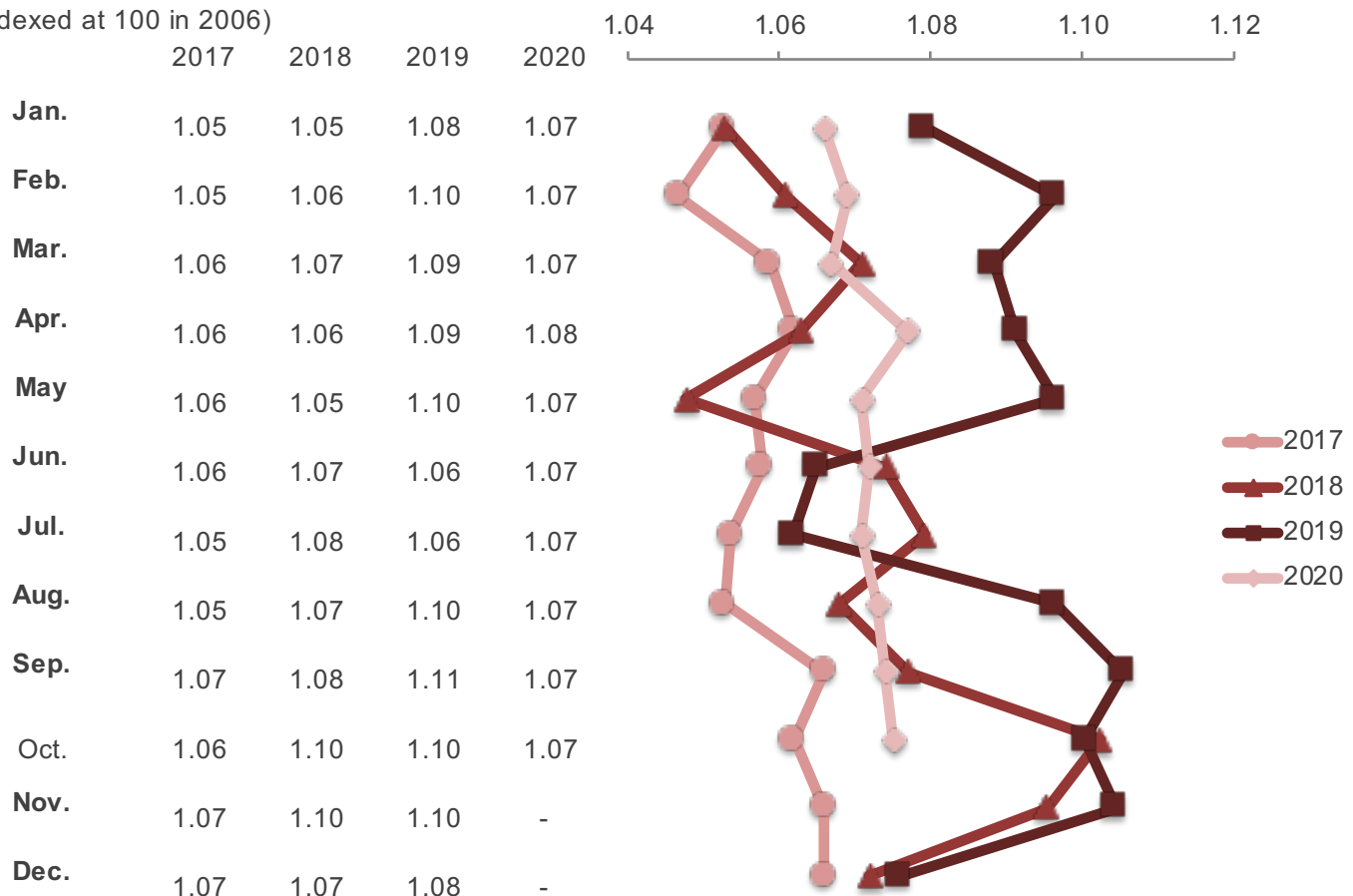
(Indexed at 100 in 2006)



Compound Annual Growth Rate **0.4%** 3-Year **-0.1%** 5-Year

Health Clubs Industry Inflation

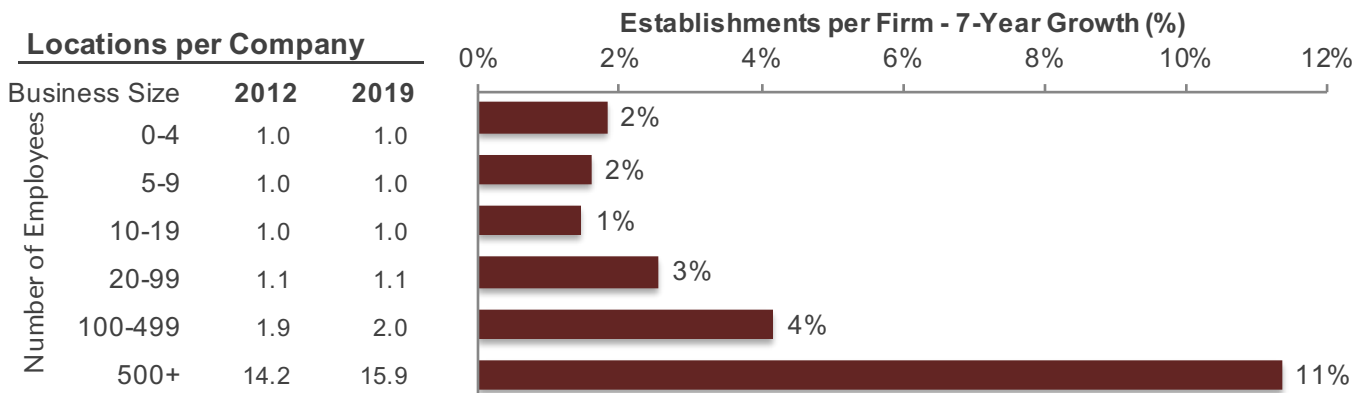
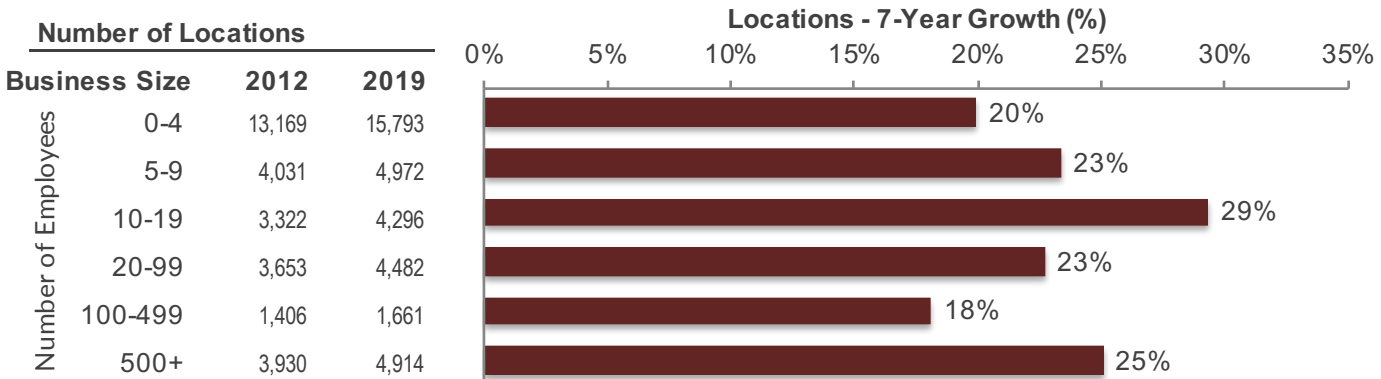
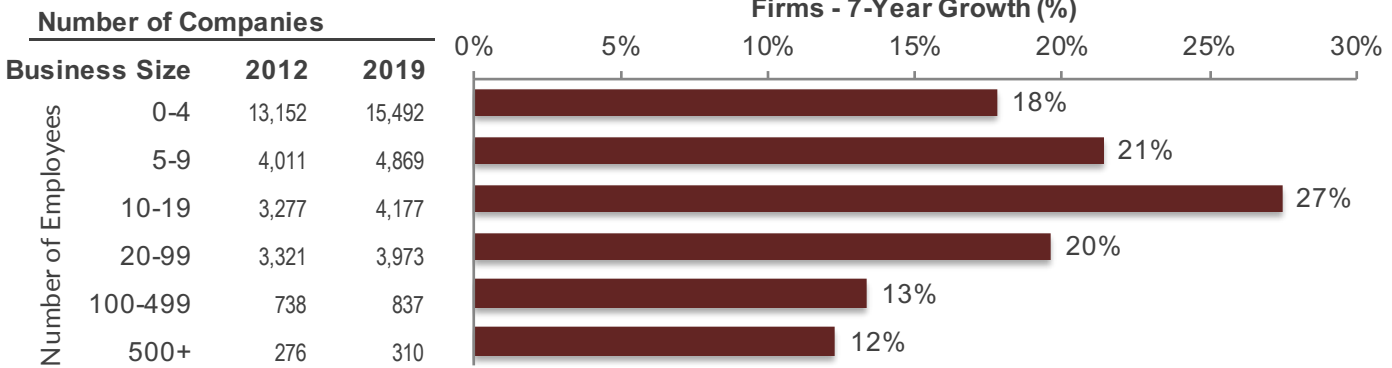
(Indexed at 100 in 2006)



Consolidation Analysis

While industry level benchmarks are useful, digging into the growth and consolidation dynamics by the size of companies (e.g., 0-4 employees = small company, 500+ employees = large company) can provide deep context and insight into the competitive dynamics. Below you have the number of companies, locations and locations per company by business size and growth over the past 7 years.

Health Clubs Industry



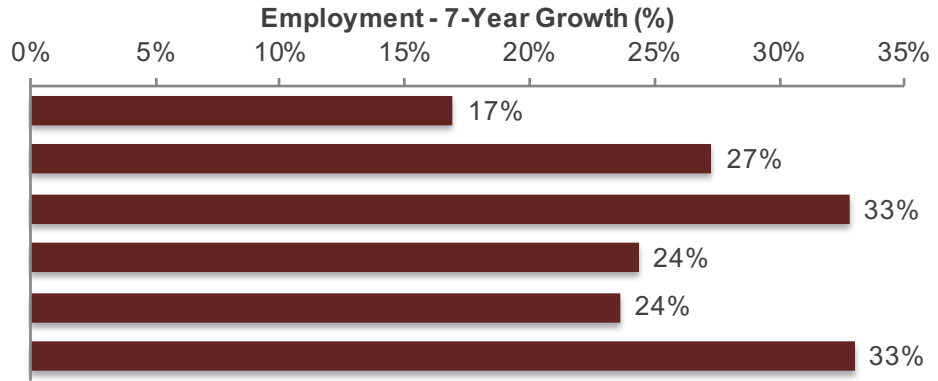
Employment by Business Size

Employment dynamics by size of company highlights a deeper level of insight into what size companies are growing and shrinking. Below are metrics on employees, employees per company, and employees per location segmented by business size with 7-year growth figures.

Health Clubs Industry

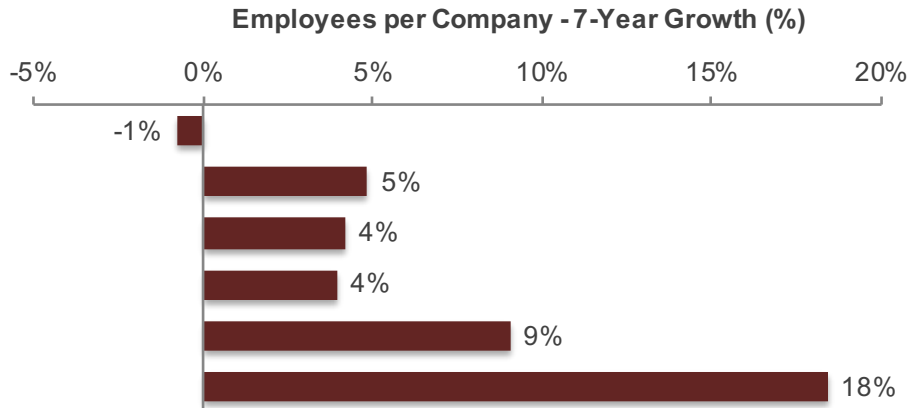
Number of Employees

Business Size	2012	2019
0-4	19,910	23,279
5-9	25,956	33,041
10-19	44,310	58,842
20-99	130,519	162,294
100-499	121,104	149,709
500+	239,618	318,654



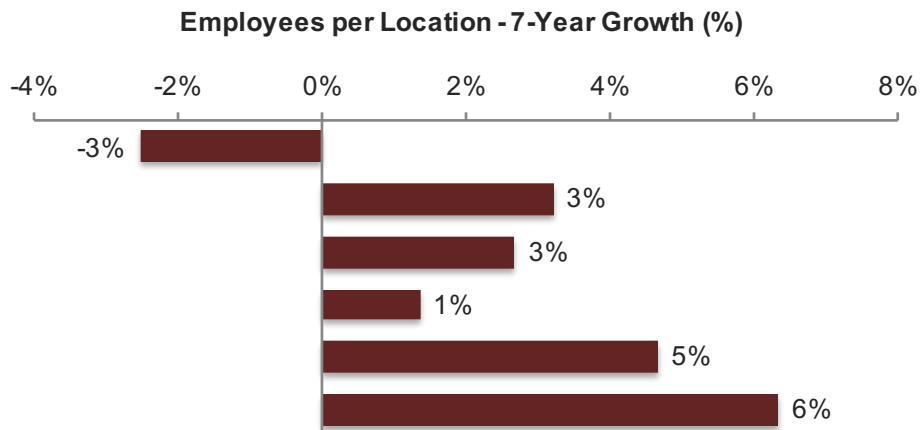
Employees per Company

Business Size	2012	2019
0-4	1.5	1.5
5-9	6.5	6.8
10-19	13.5	14.1
20-99	39.3	40.8
100-499	164	178.9
500+	868.2	1,028.1



Employees per Location

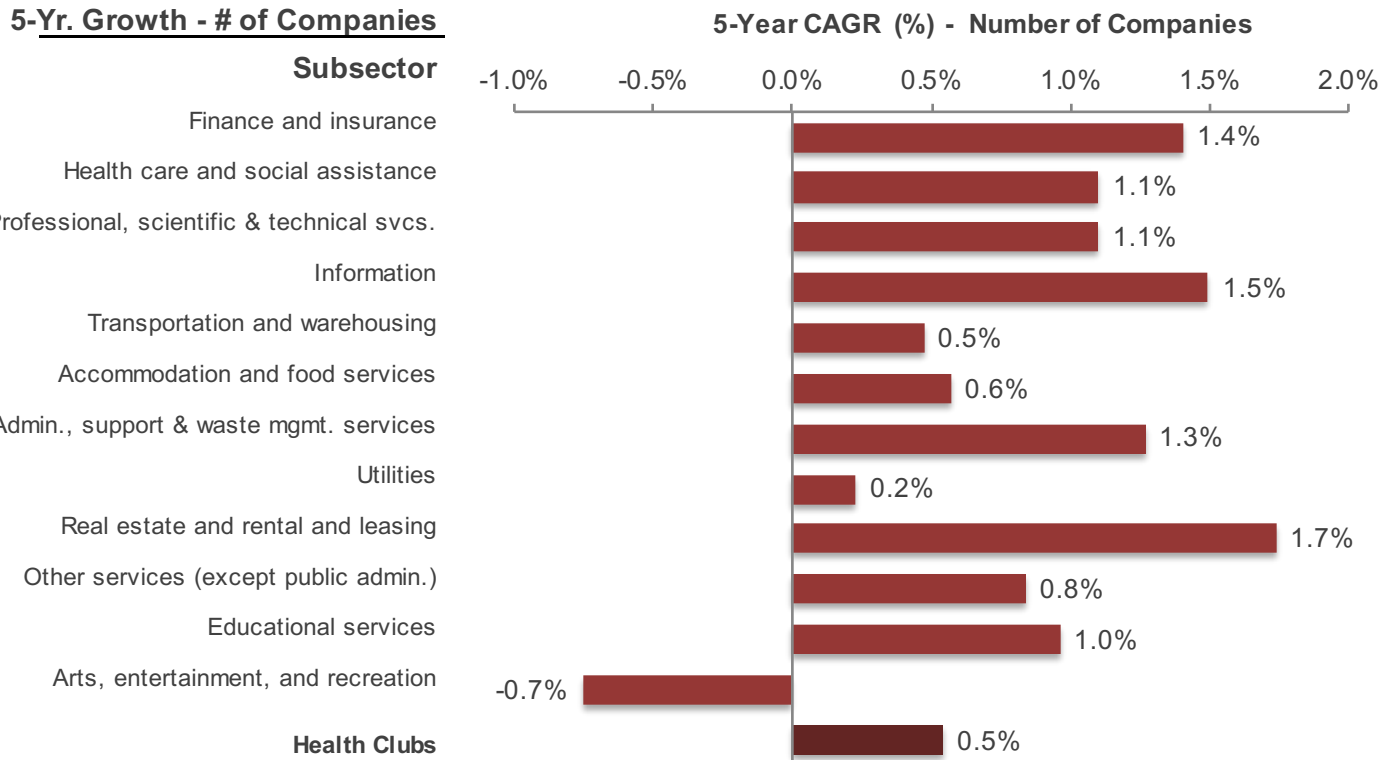
Business Size	2012	2019
0-4	1.5	1.5
5-9	6.4	6.6
10-19	13.3	13.7
20-99	35.7	36.2
100-499	86.1	90.2
500+	61.0	64.8



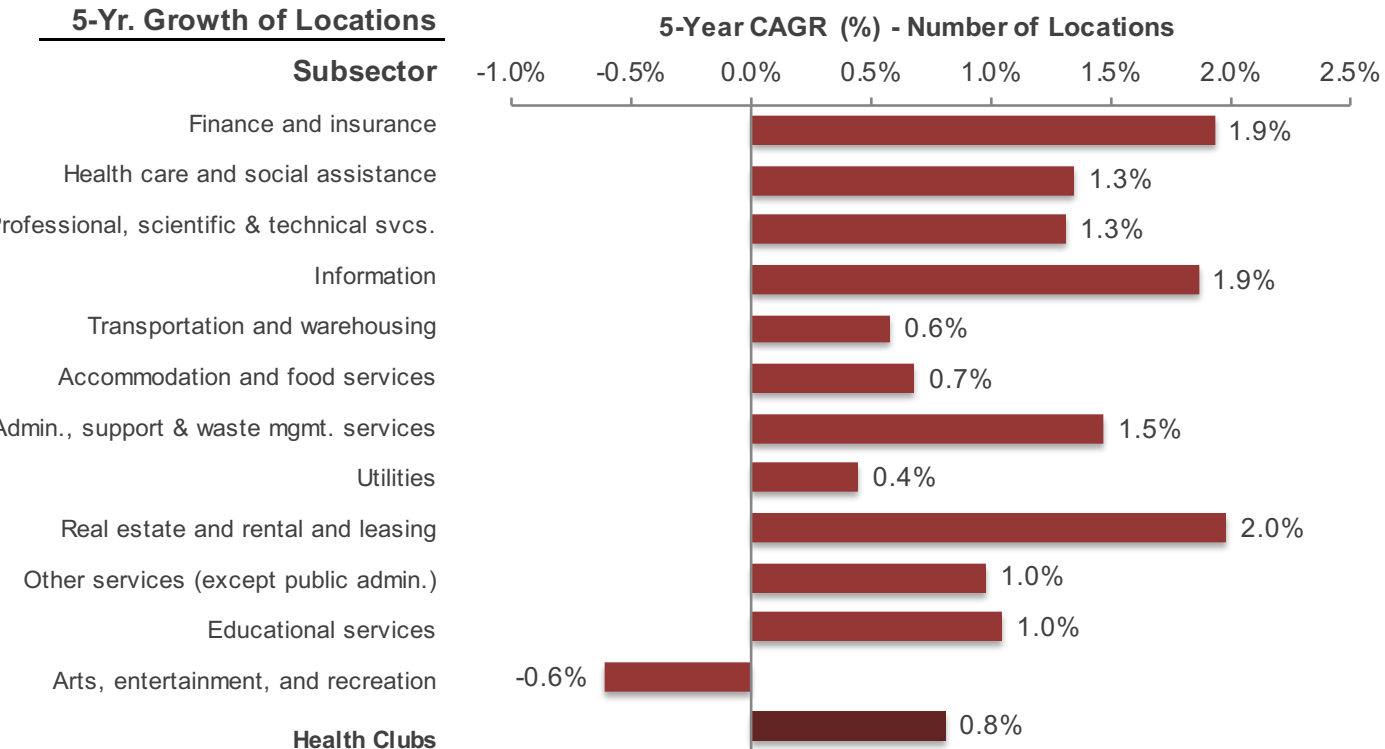
Subsector Analysis (1/2)

Below are 5-year growth figures for number of companies and locations for all of the major services subsectors with the Health Clubs industry metric at the bottom of the chart.

5-Yr. Growth - # of Companies



5-Yr. Growth of Locations



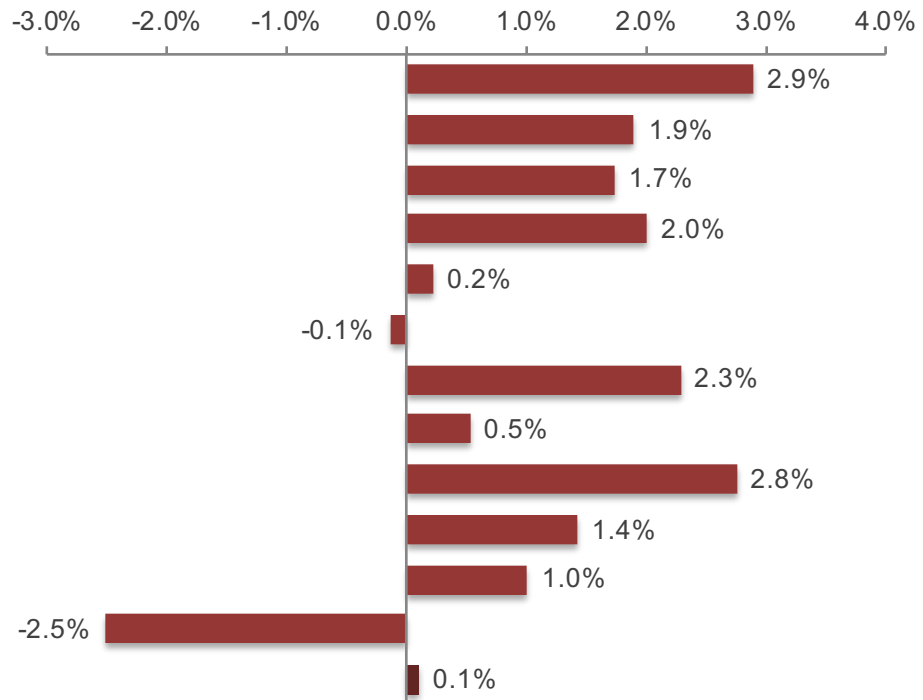
Subsector Analysis (2/2)

Below are 5-year growth figures for number of employees and payroll per employee for all major services subsectors with the Health Clubs industry metric at the bottom of the chart.

5-Yr. Growth of Employees

Subsector

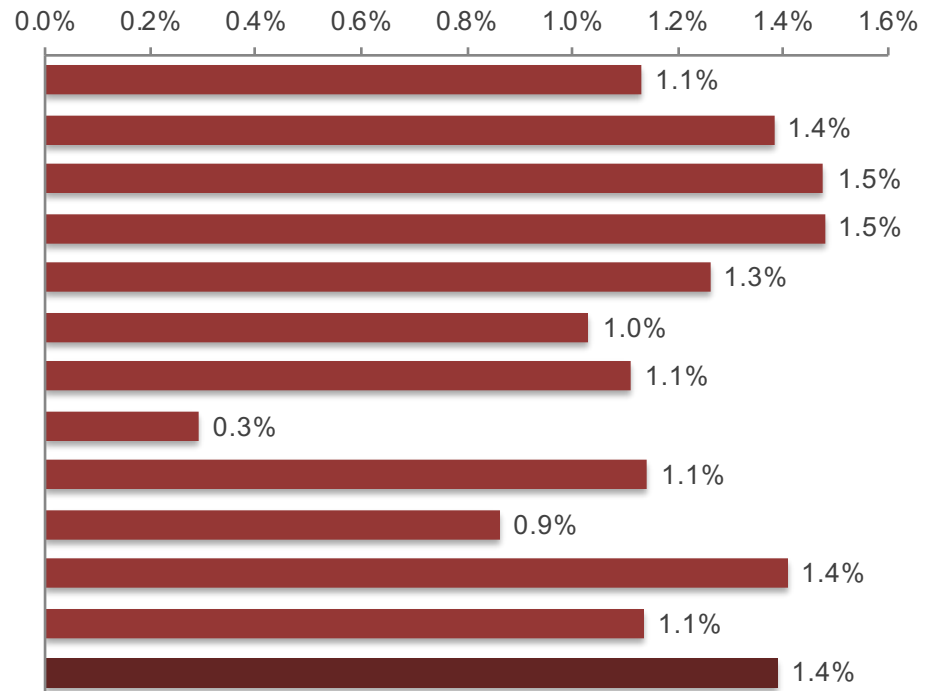
5-Year CAGR (%) - Employee Growth



5-Yr. Gwth. - Payroll per Empl.

Subsector

5-Year CAGR (%) - Payroll per Employee



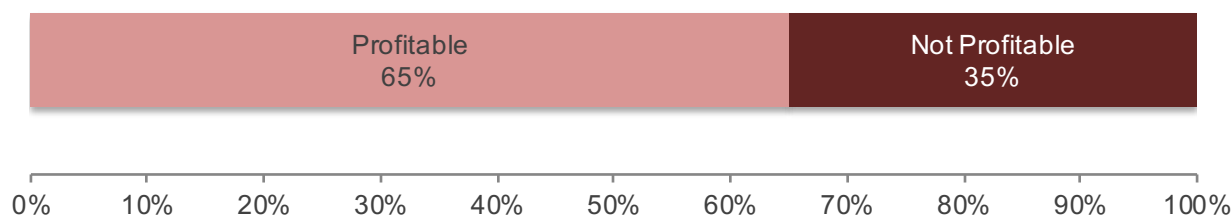
Section Two

Costs, Capital & Profit Benchmarks

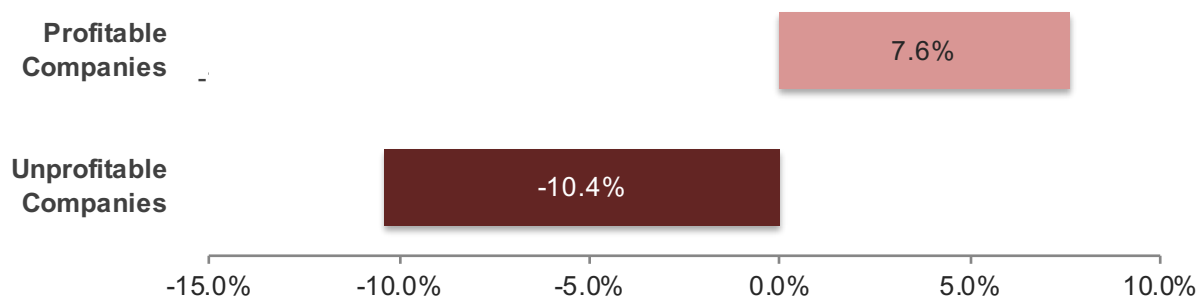
Profitability & Financial Ratio Analysis

Below are benchmarks for the percent of companies that are profitable, average net income as a percent of revenue, and financial ratios including total asset turnover, fixed asset turnover, fixed assets to total assets ratio, total assets to total liabilities ratio, return on sales, return on total assets, return on net worth, total liabilities to net worth ratio, fixed assets to net worth ratio, and solvency ratio.

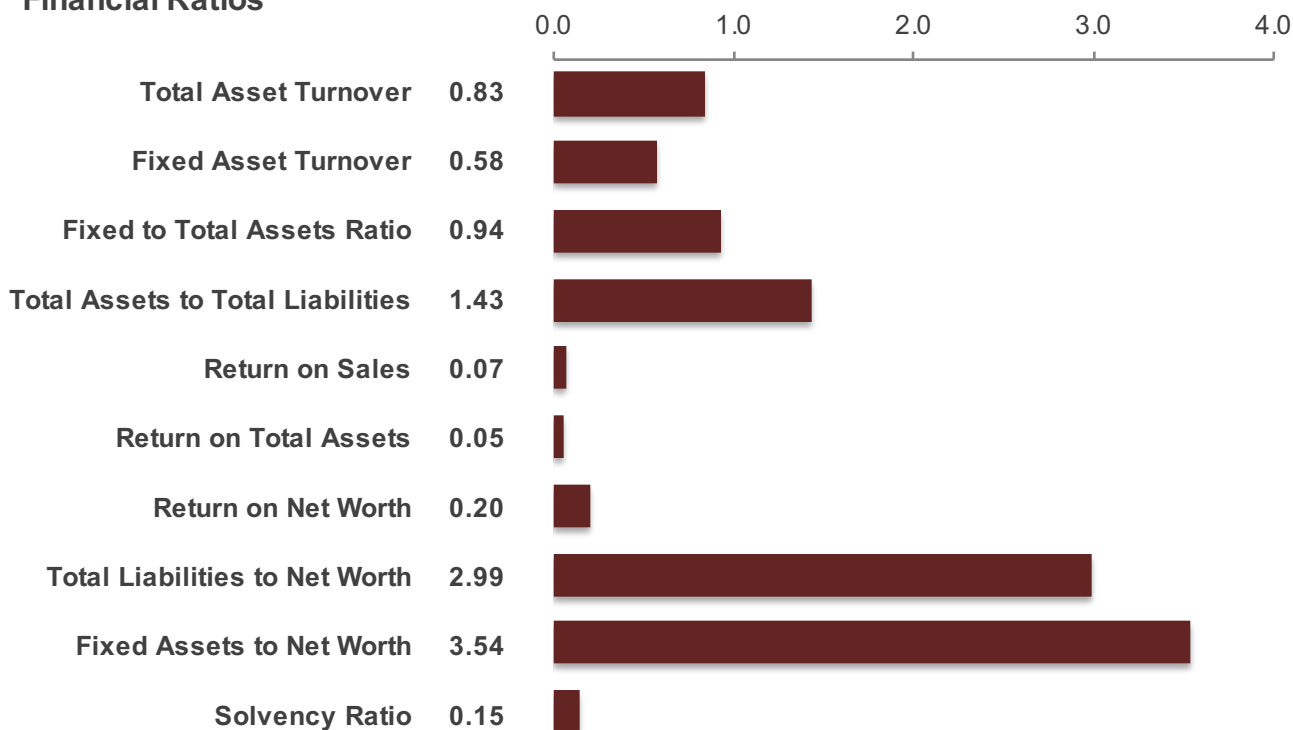
Percent of Companies that are Profitable



Average Net Income as a Percent of Revenue



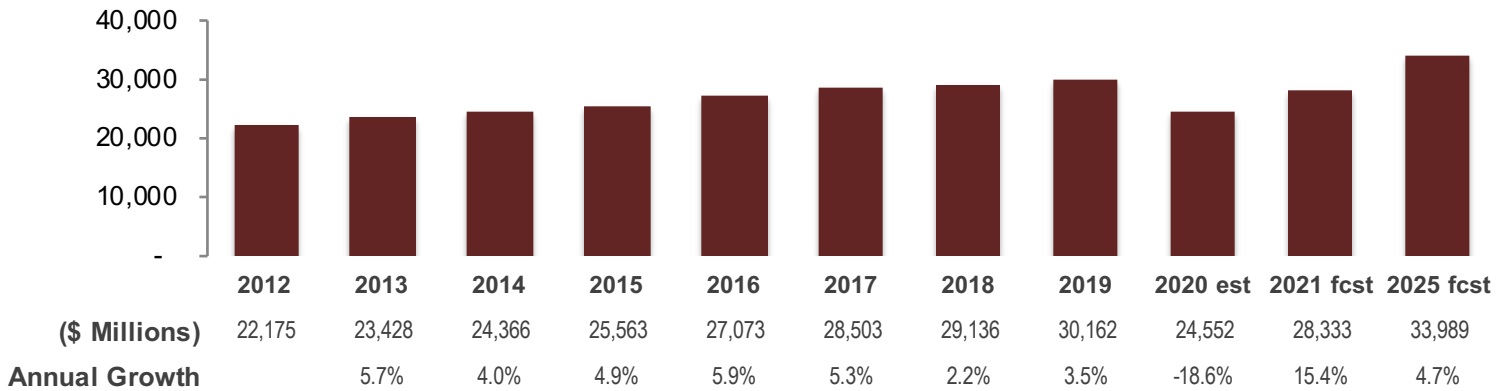
Financial Ratios



Operating Expenses

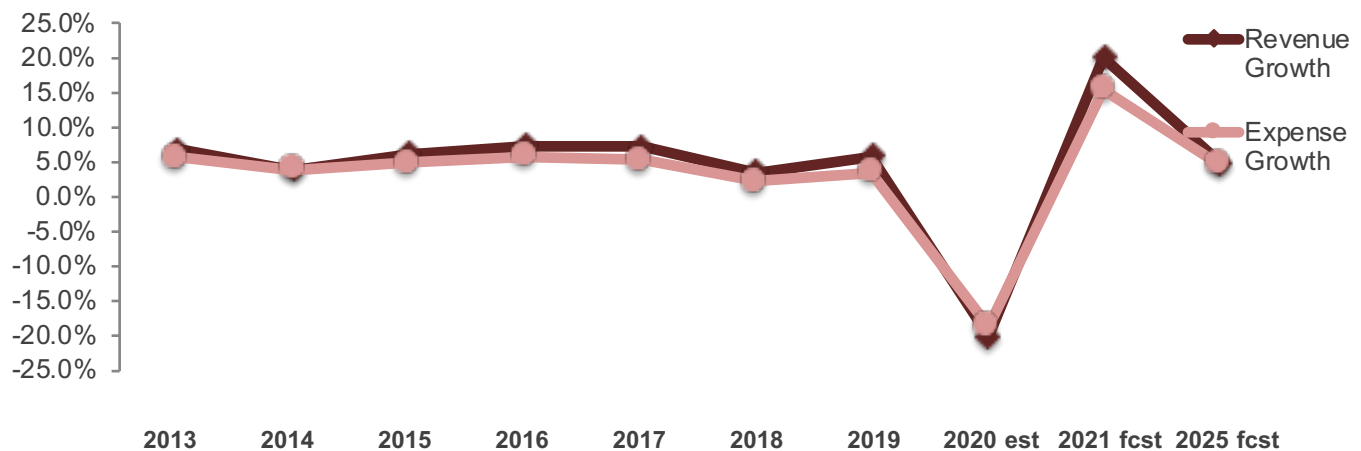
Below is total industry operating expense, industry revenue vs. industry opex growth, and opex as a percentage of revenue for the Health Clubs industry. The data sets include historical and forecasts.

Industry Operating Expenses

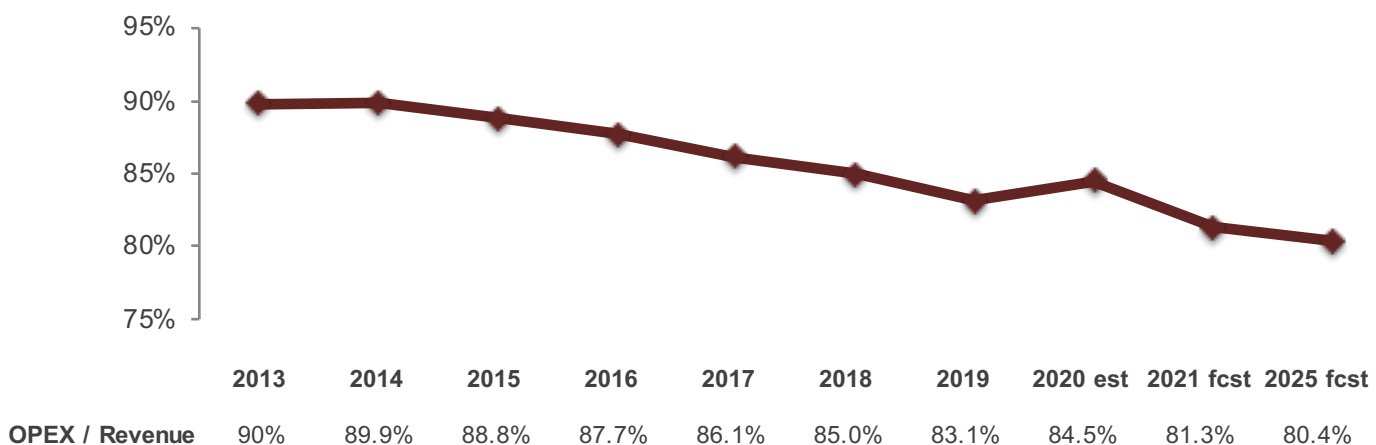


Compound Annual Growth Rate **-4.9%** 3-Year **-0.8%** 5-Year

Industry Revenue vs. Operating Expense Growth



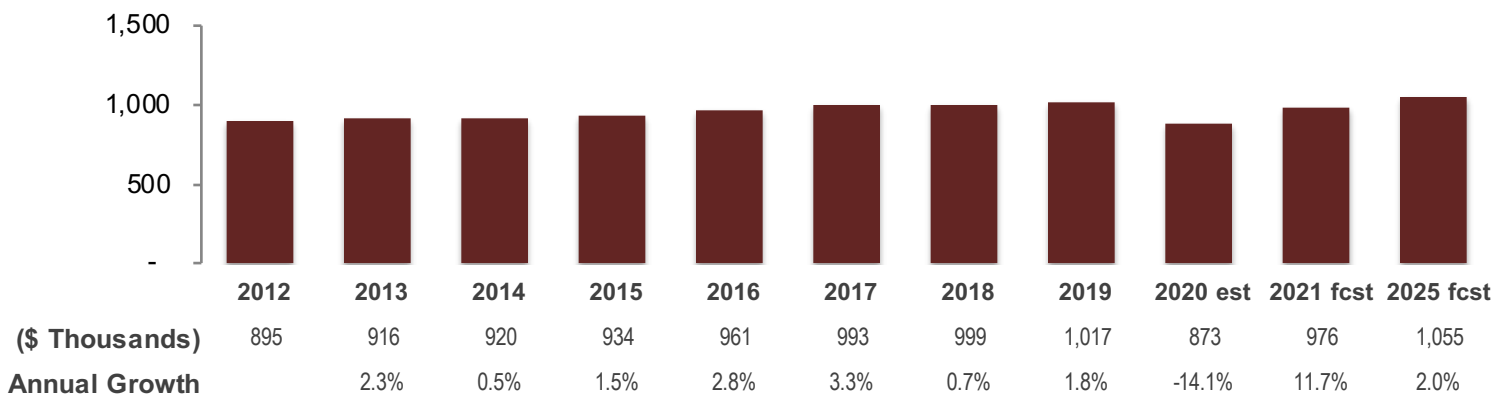
Operating Expense as a Percent of Revenue



Operating Expenses per Company & Location

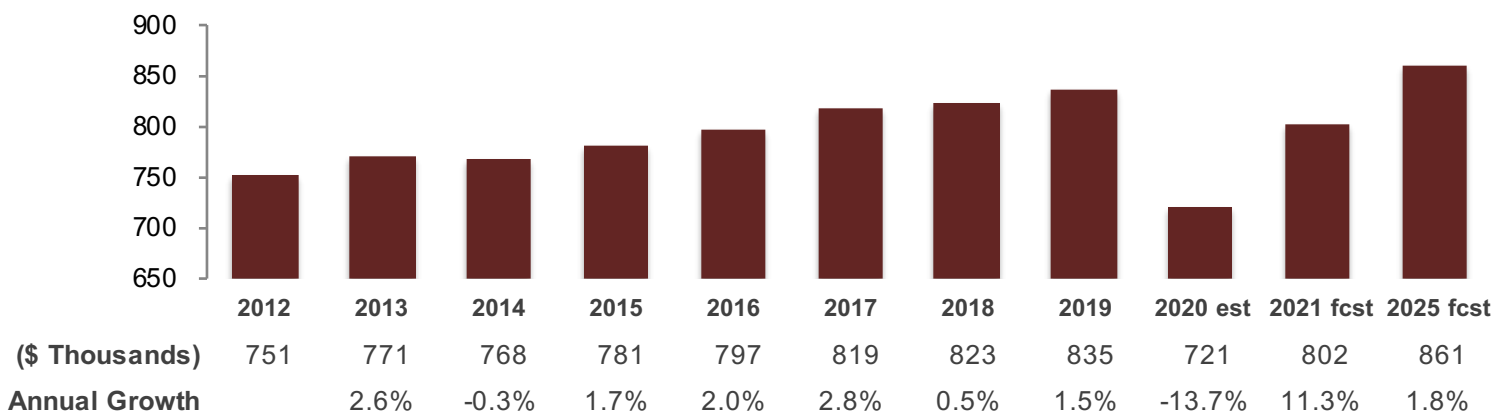
Given the dynamics of company and location growth and consolidation in the industry, it is important to normalize operating expense growth by company and location, which are below. This serves as a better benchmark for operating expense comparisons.

Industry Operating Expenses per Company



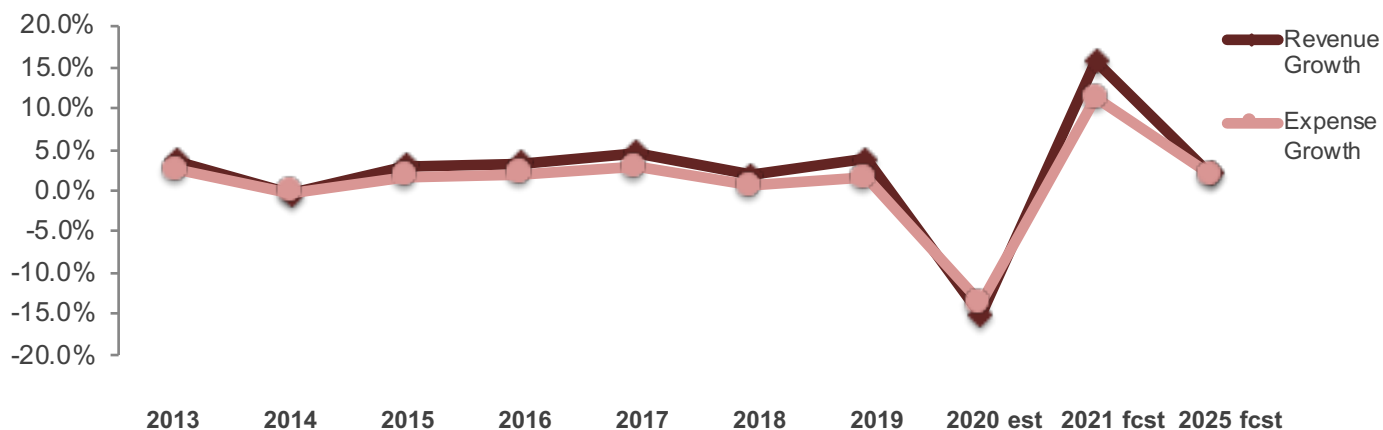
Compound Annual Growth Rate **-4.2%** 3-Year **-1.3%** 5-Year

Industry Operating Expenses per Location



Compound Annual Growth Rate **-4.2%** 3-Year **-1.6%** 5-Year

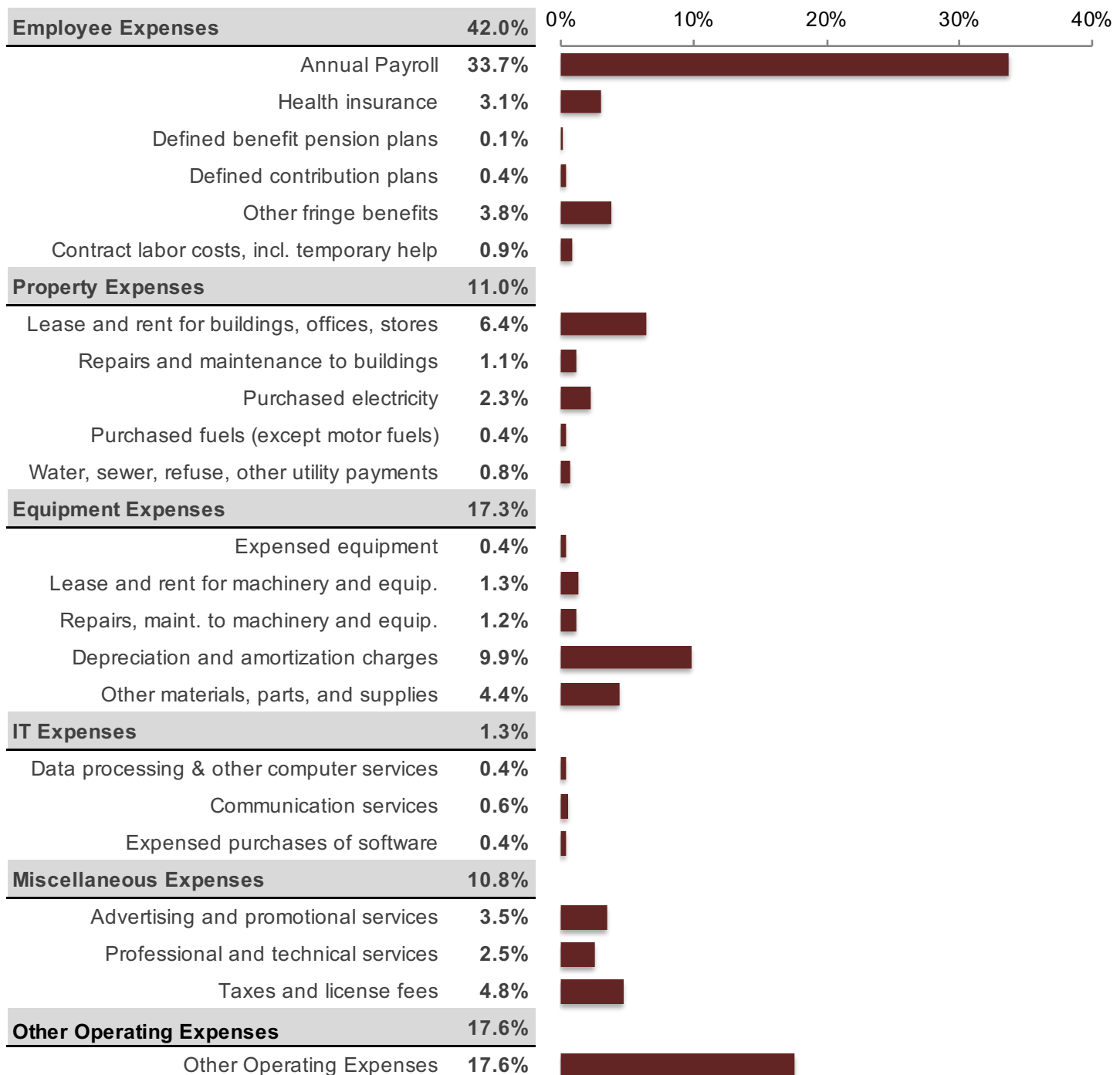
Revenue Growth per Location vs. Operating Expense Growth per Location



Operating Expense Detail

Below outlines the breakdown of operating expenses, broken down by employee, property, equipment, IT, and other categories. Operating expense detail is typically used in a gap analysis to highlight opportunities where a company has variances to the benchmark expense data.

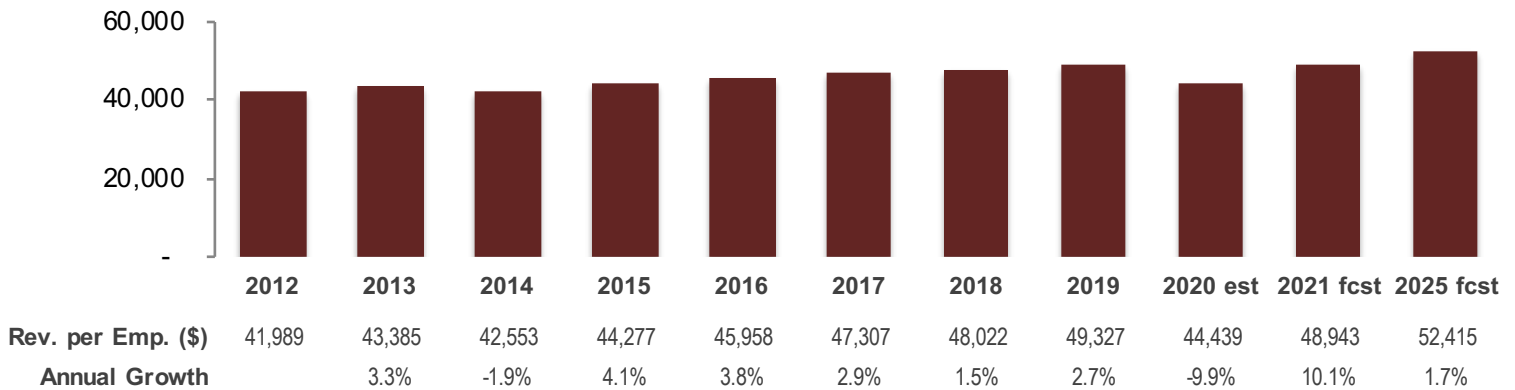
Operating Expense Breakdown



Employee Productivity & Industry Employment

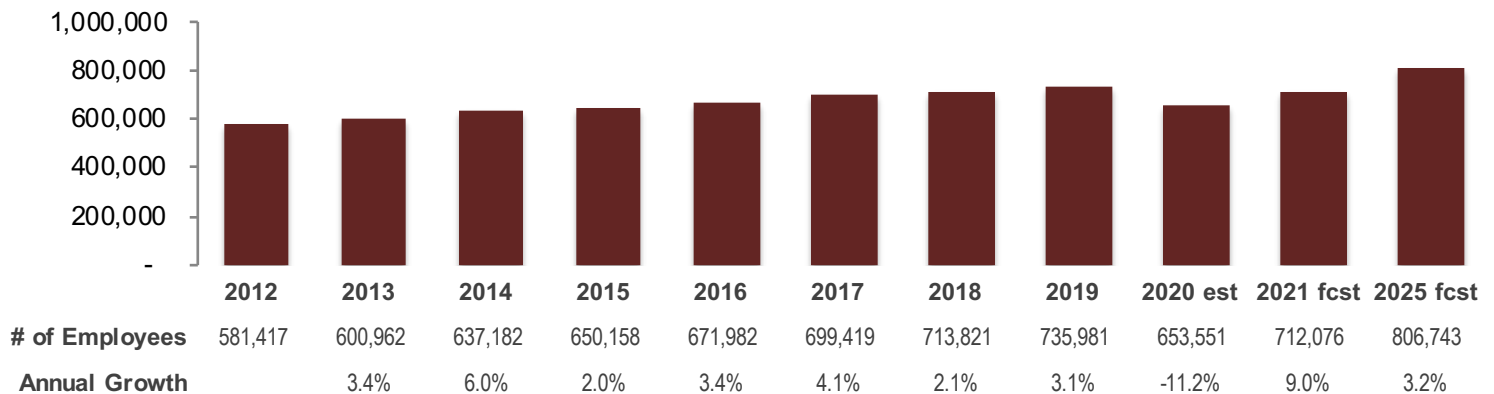
Below are data sets on productivity (revenue per employee), total industry employees, and employees per company. Each data set includes historical and forecasts.

Productivity - Revenue (output) per Employee



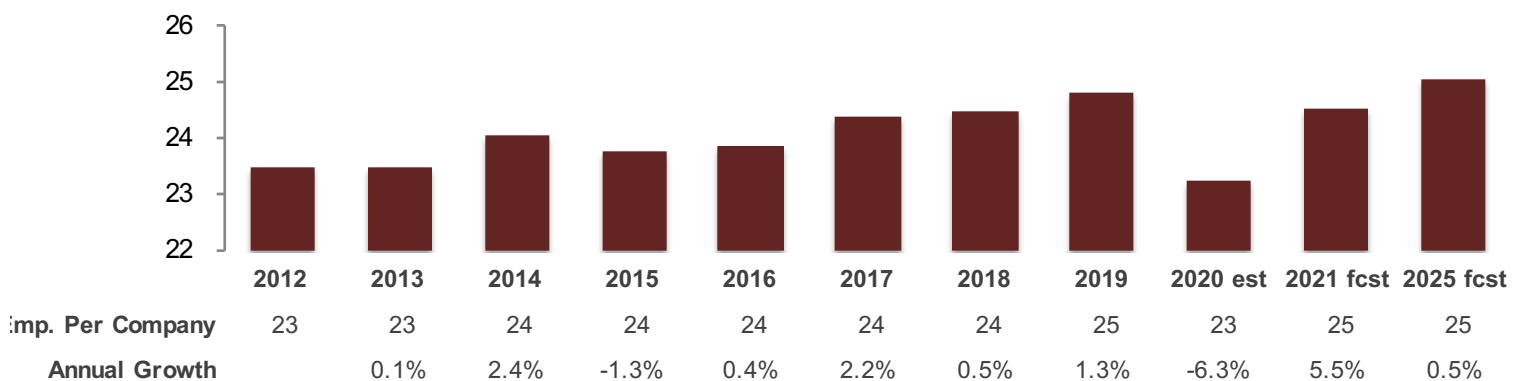
Compound Annual Growth Rate **-2.1%** 3-Year **0.1%** 5-Year

Total Industry Employees



Compound Annual Growth Rate **-2.2%** 3-Year **0.1%** 5-Year

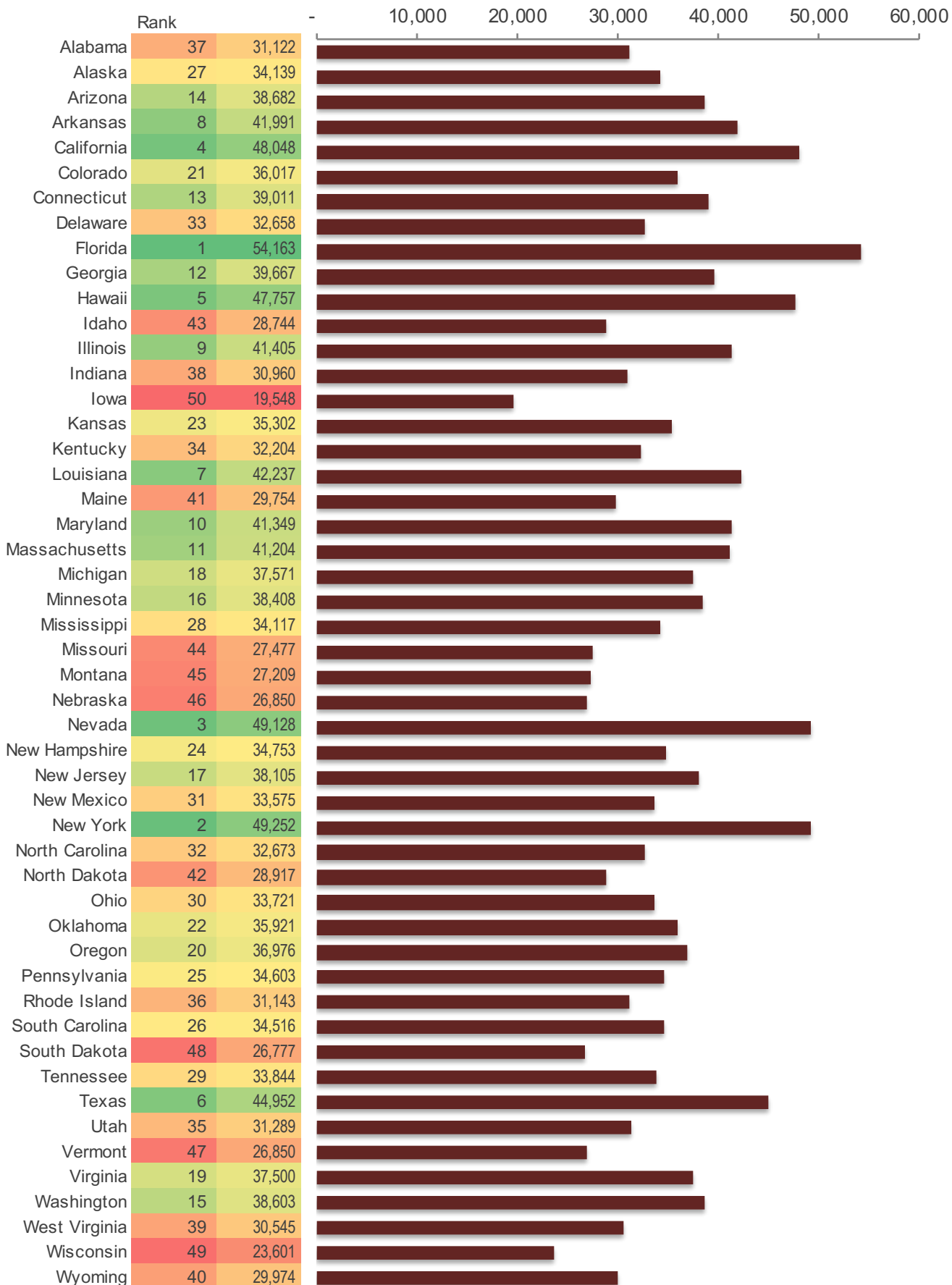
Employees per Company



Compound Annual Growth Rate **-1.5%** 3-Year **-0.4%** 5-Year

Productivity by State - Revenue (output) per Employee

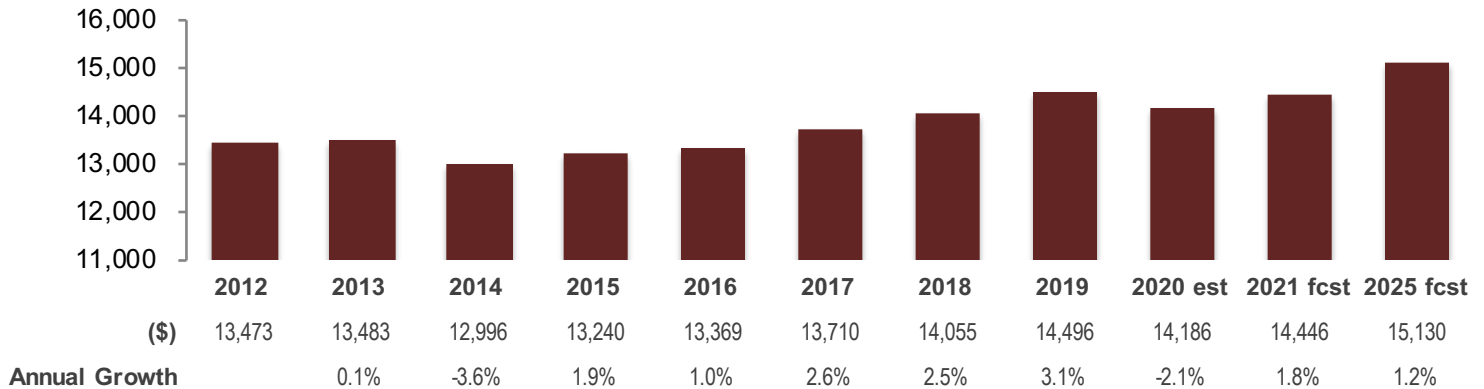
Below is productivity (total revenue divided by total number of employees) by state. When it states "no data", there wasn't a sufficient sample size of data for the state.



Industry Payroll

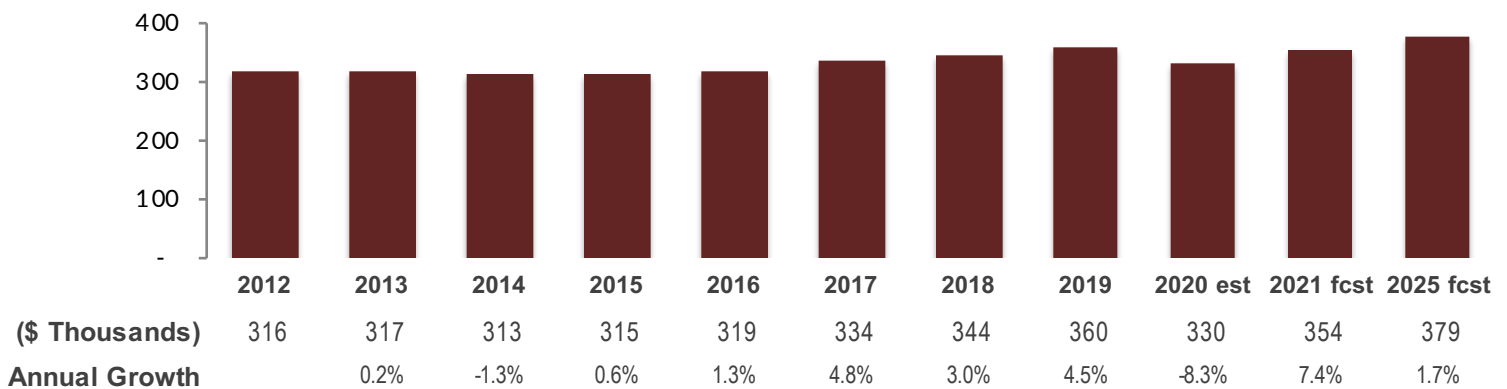
One of the consistently difficult strategic questions for every company is "are we paying our people the right amount?" In the next sections, we'll tackle this question from many different angles. The first benchmarks below cover payroll per employee, company, and location. In particular, payroll per employee is a strong metric to benchmark against, both in terms of the dollar figure but also the historical and forecasted growth.

Payroll per Employee



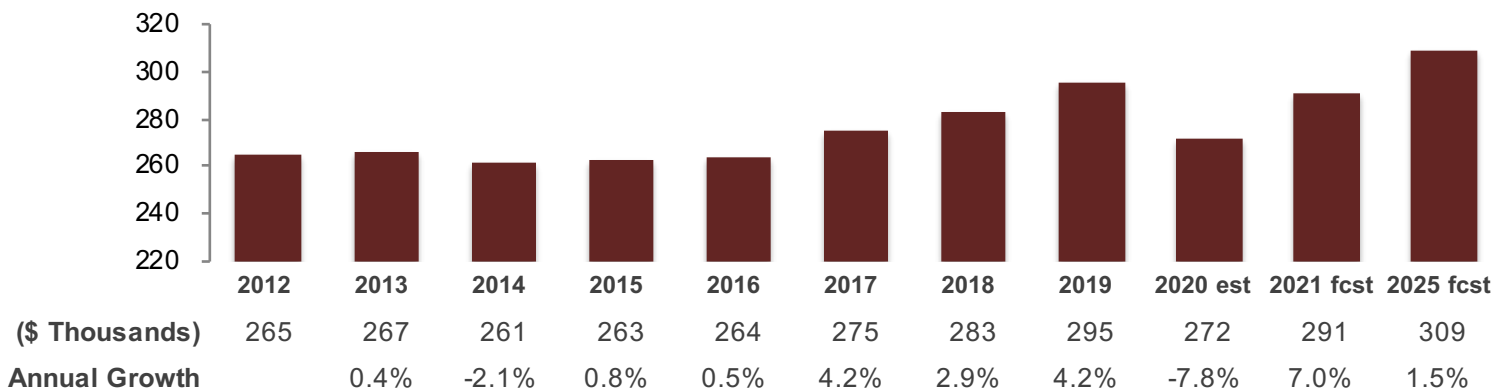
Compound Annual Growth Rate **1.1%** 3-Year **1.4%** 5-Year

Payroll per Company



Compound Annual Growth Rate **-0.4%** 3-Year **0.9%** 5-Year

Payroll per Location



Compound Annual Growth Rate **-0.4%** 3-Year **0.7%** 5-Year

Payroll by Business Size

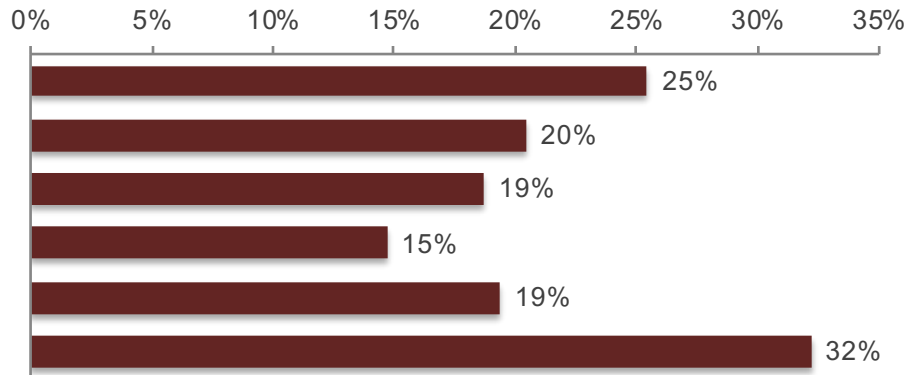
Payroll by business size metrics can create insights into how different size companies are fairing and how they pay for talent. Typically, the payroll per employee by business size (last chart) tells an interesting story about how different size companies compensate their talent.

Health Clubs Industry

Payroll per Company (\$000s)

Business Size	2012	2019
0-4	35	44
5-9	84	101
10-19	177	210
20-99	479	549
100-499	2,097	2,504
500+	12,027	15,897

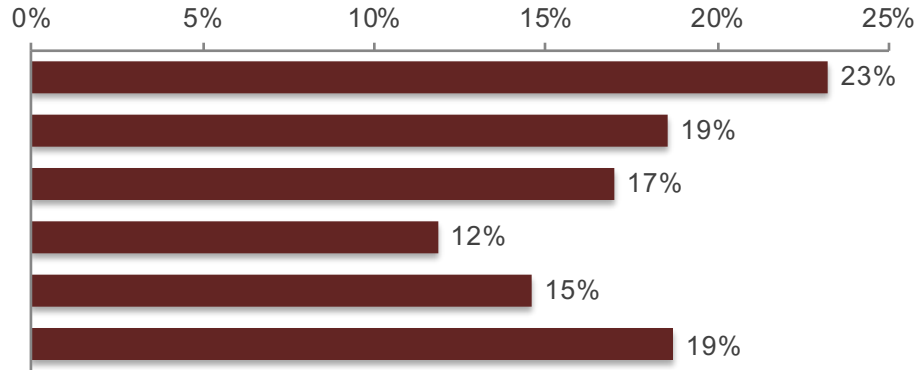
Payroll per Firm - 7-Year Growth (%)



Payroll per Establ. (\$000s)

Business Size	2012	2019
0-4	35	43
5-9	83	99
10-19	174	204
20-99	435	487
100-499	1,101	1,261
500+	845	1,003

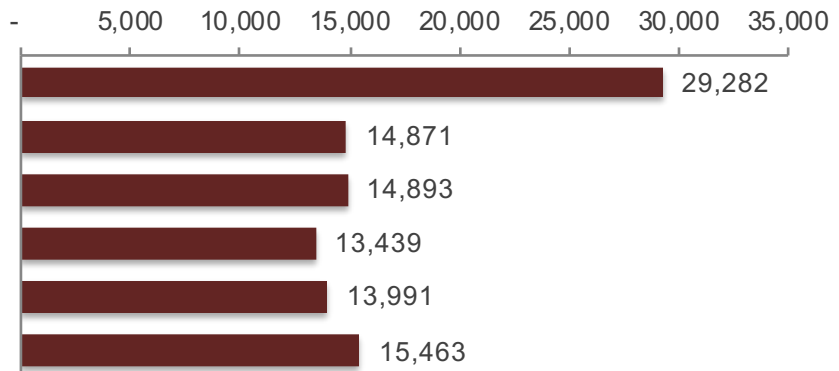
Payroll per Establishment - 7-Year Growth (%)



Payroll per Employee (\$)

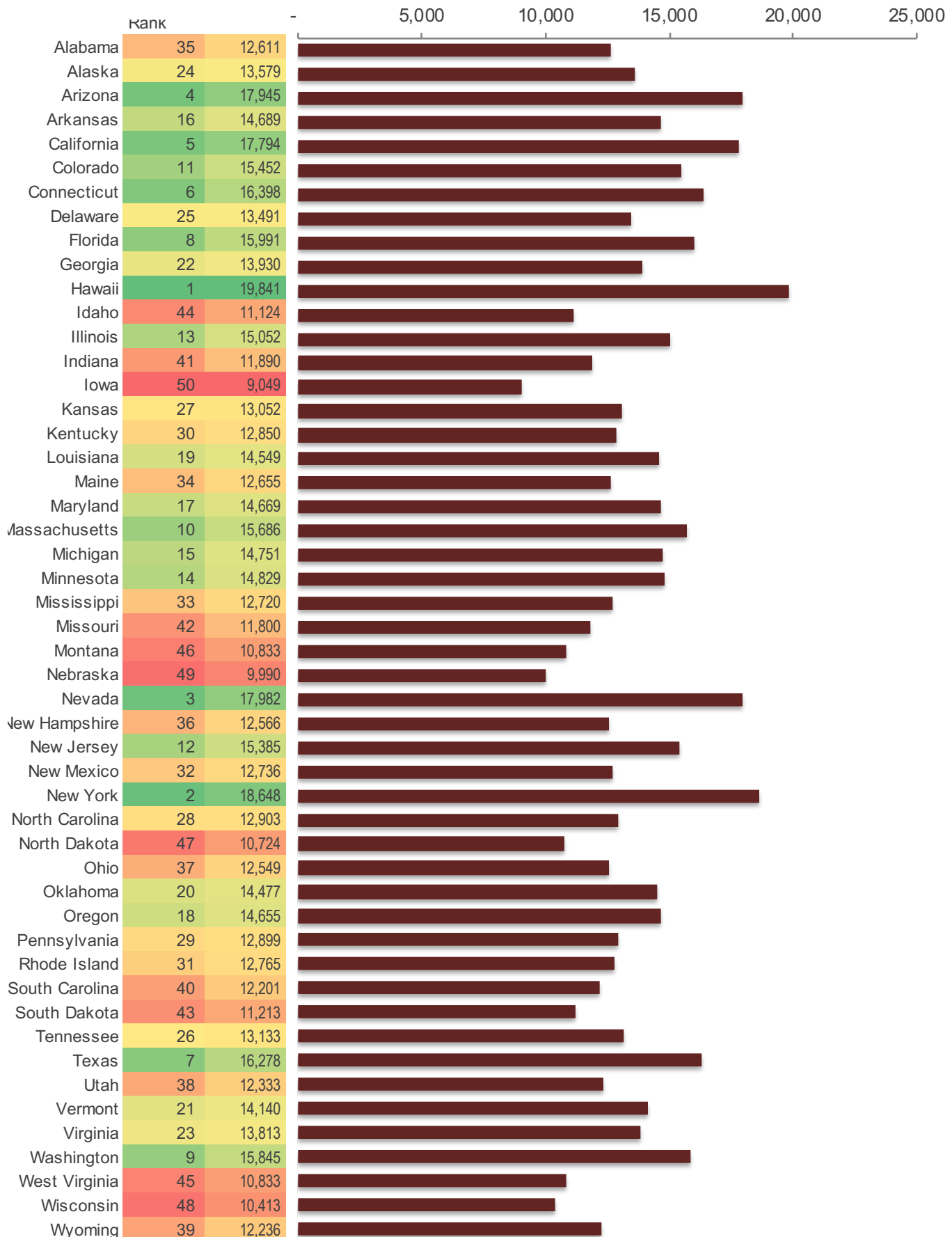
Business Size	2012	2019	7-Yr. Growth
0-4	23,168	29,282	26%
5-9	12,947	14,871	15%
10-19	13,072	14,893	14%
20-99	12,179	13,439	10%
100-499	12,781	13,991	9%
500+	13,853	15,463	12%

2020 Payroll per Employee



Payroll per Employee by State

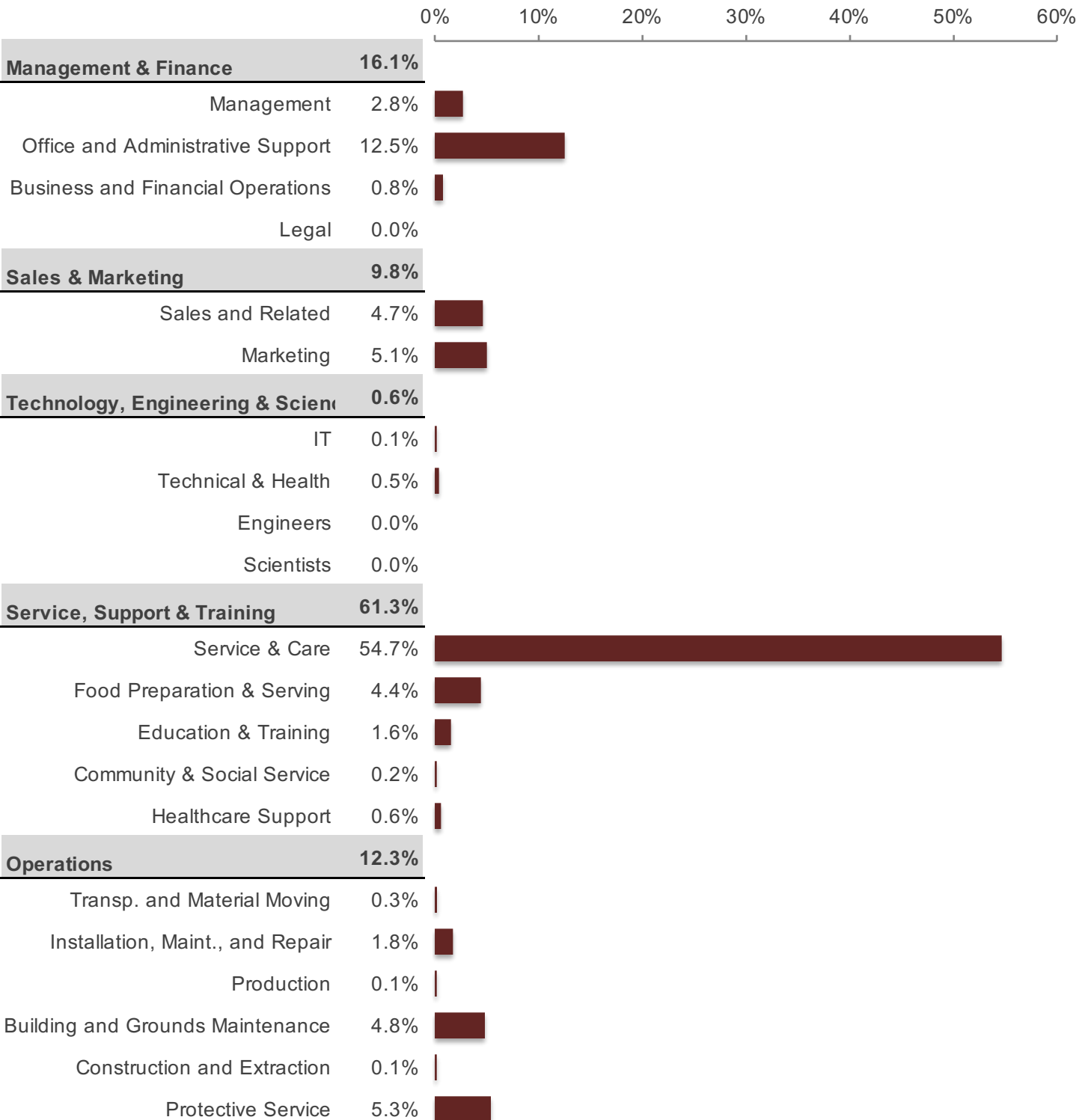
The competition for talent is local, with the supply and demand dynamics of each state driving compensation. When it states "no data", there wasn't a sufficient sample size of data for the state.



Job Categorization Benchmarks

Ensuring your company has the right people in the right roles, is just as important as having the right number of people and the proper compensation. Pay particular attention to management ratios, and the three higher-level categories of 1. management & finance, 2. sales, service & marketing, and 3. operations.

Job Categories as a % of Total Employees



Job Categorization Pay Ranges

Below are the pay ranges of the high-level job categories. The bottom 10% represents the average that the 10% lowest paid receive in hourly pay, while the top 90% represents the average that the 10% highest paid receive in hourly pay. In those instances where the sample size was not statistically significant, the figures are left blank.

Health Clubs

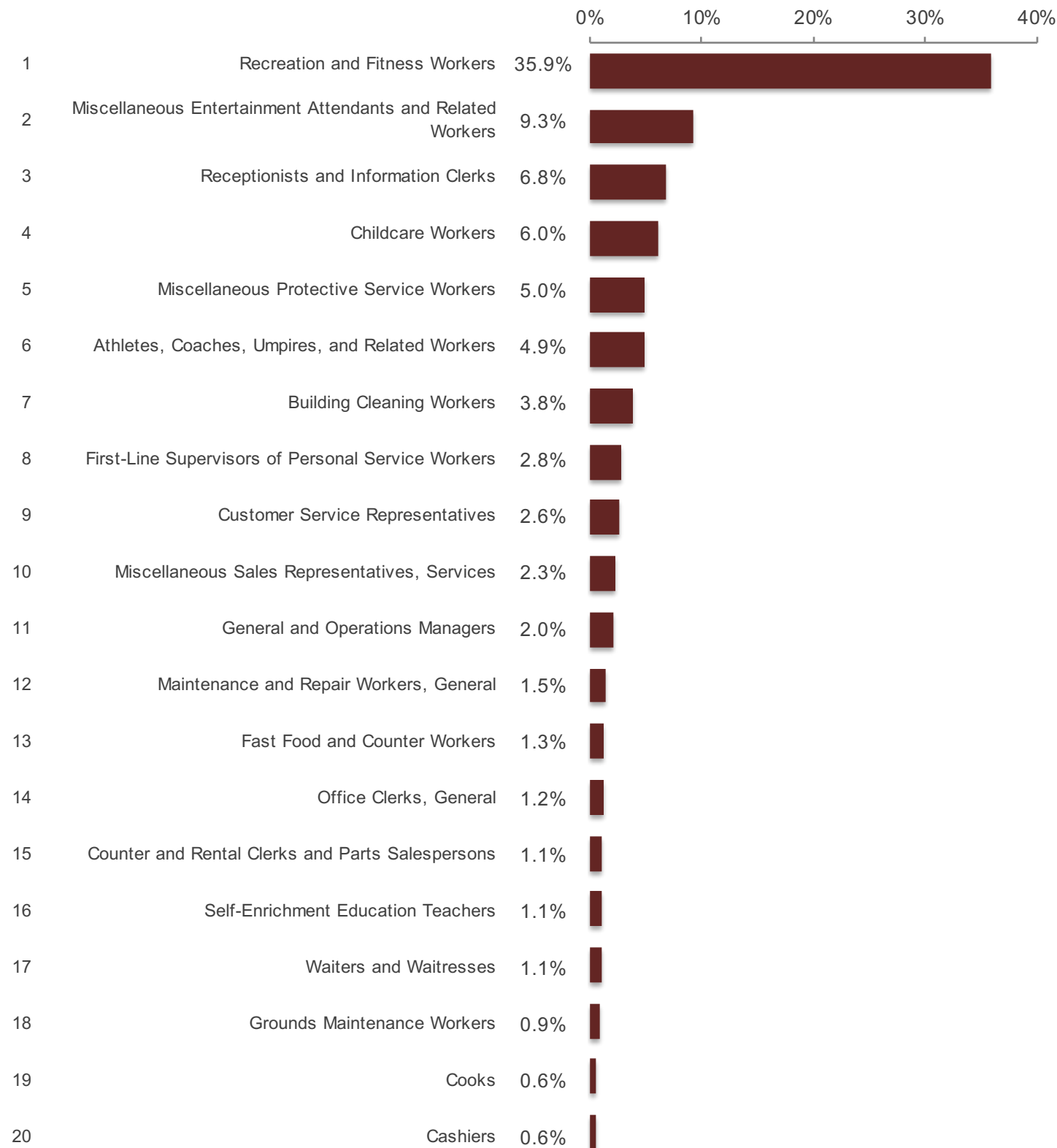
Industry Pay Ranges

	Bottom 10%	Bottom 25%	Mean	Top 75%	Top 90%
Management & Finance					
Management	\$16.51	\$23.07	\$42.70	\$50.96	\$78.42
Office and Administrative Support	\$8.82	\$9.90	\$13.69	\$15.60	\$20.83
Business and Financial Operations	\$12.66	\$17.39	\$25.99	\$32.13	\$44.11
Legal	#	#	#	#	#
Sales & Marketing					
Sales and Related	\$8.86	\$9.98	\$16.28	\$17.60	\$29.26
Arts, Design, Entertainment, Media	\$9.82	\$11.81	\$21.05	\$26.74	\$36.44
Technology, Engineering & Science					
Computers	\$13.88	\$18.73	\$28.59	\$36.06	\$46.56
Technical & Healthcare	\$11.14	\$16.83	\$28.10	\$33.55	\$46.65
Engineering & Architecture	#	#	#	#	#
Life, Physical & Social Science	#	#	#	#	#
Service, Support & Training					
Personal Service & Care	\$9.18	\$10.91	\$18.55	\$24.03	\$31.87
Food Preparation & Serving	\$8.80	\$9.63	\$13.11	\$14.47	\$19.29
Education, Training & Library	\$9.27	\$10.99	\$17.91	\$22.99	\$30.39
Community & Social Service	\$9.46	\$13.82	\$21.72	\$25.91	\$37.64
Healthcare Support	\$9.69	\$11.85	\$22.18	\$27.97	\$43.76
Operations					
Transportation and Material Moving	\$9.50	\$10.95	\$15.61	\$18.07	\$24.31
Installation, Maint., and Repair	\$9.84	\$11.77	\$17.78	\$21.87	\$28.89
Production	\$9.69	\$11.13	\$13.84	\$15.58	\$19.05
Building and Grounds Maintenance	\$9.27	\$10.65	\$13.47	\$14.69	\$19.48
Construction and Extraction	\$12.76	\$14.89	\$23.54	\$29.75	\$40.99
Protective Service	\$8.48	\$9.31	\$11.70	\$12.28	\$15.83

Top 20 Industry Jobs -Percent of Employment

The below metrics go into the details of the industry's top jobs ranked by percent of total employment.

Top Jobs - Percent of Total Employment



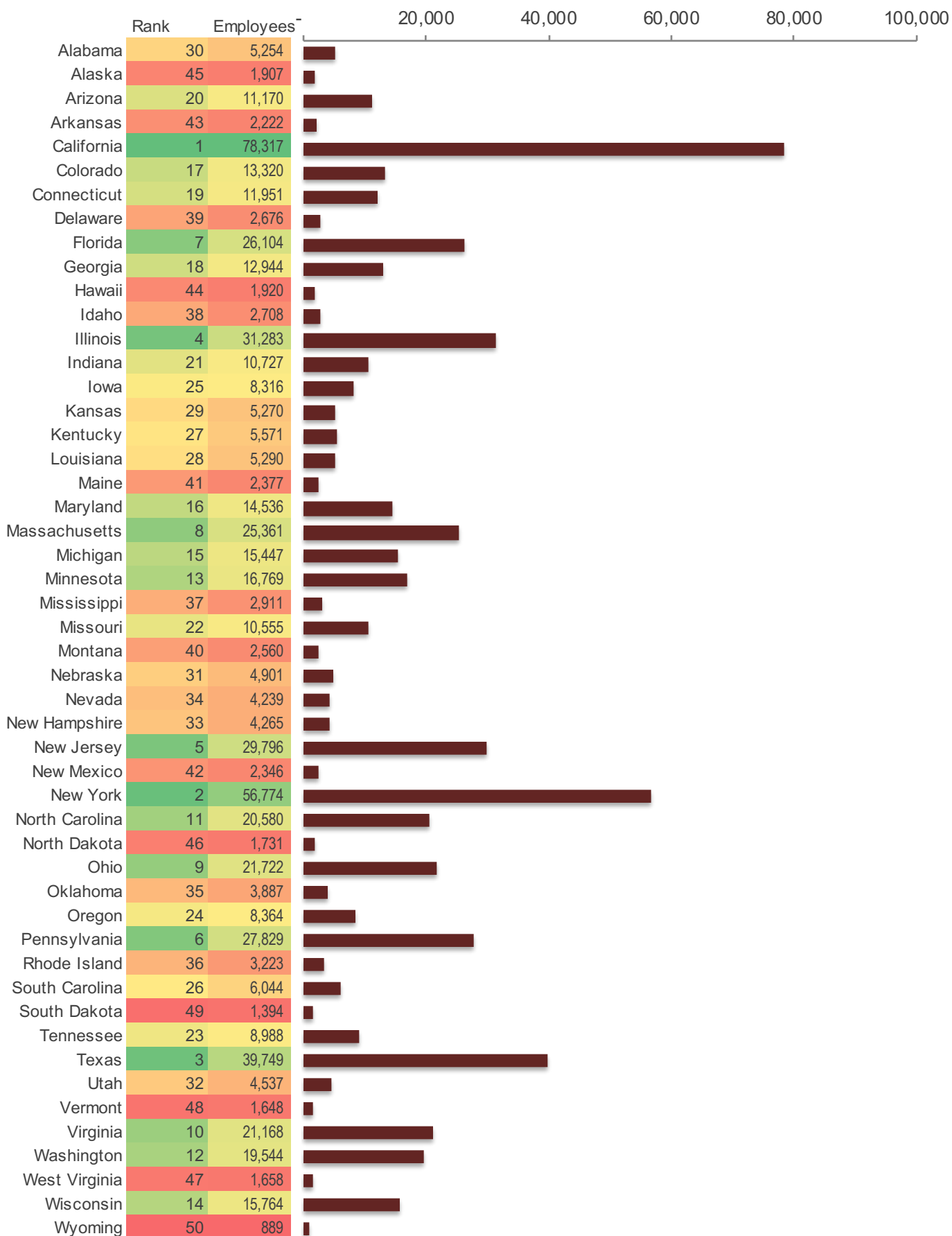
Top 20 Jobs - Pay Bands

Below are the details of the wage bands for the industry's top jobs. The bottom 10% represents the average that the 10% lowest paid receive in hourly pay, while the top 90% represents the average that the 10% highest paid receive in hourly pay. In those instances where the sample size was not statistically significant, the figures are left blank.

Top Detailed Jobs - Pay Bands		Bottom 10%	Bottom 25%	Mean	Top 75%	Top 90%
1	Recreation and Fitness Workers	\$9.67	\$12.17	\$21.47	\$27.62	\$36.98
2	Miscellaneous Entertainment Attendants and Related Workers	\$8.80	\$9.91	\$11.69	\$12.77	\$15.09
3	Receptionists and Information Clerks	\$8.64	\$9.46	\$11.96	\$13.62	\$17.03
4	Childcare Workers	\$8.34	\$9.10	\$11.04	\$12.02	\$14.79
5	Miscellaneous Protective Service Workers	\$8.45	\$9.26	\$11.16	\$12.00	\$14.66
6	Athletes, Coaches, Umpires, and Related Workers	*	*	*	*	*
7	Building Cleaning Workers	\$9.20	\$10.53	\$12.83	\$14.09	\$18.05
8	First-Line Supervisors of Personal Service Workers	\$11.97	\$14.71	\$20.83	\$25.48	\$31.34
9	Customer Service Representatives	\$8.83	\$10.10	\$13.13	\$14.67	\$19.16
10	Miscellaneous Sales Representatives, Services	\$9.57	\$11.33	\$19.76	\$23.39	\$36.72
11	General and Operations Managers	\$16.23	\$22.88	\$41.51	\$49.91	\$76.39
12	Maintenance and Repair Workers, General	\$9.63	\$11.48	\$16.85	\$20.50	\$26.70
13	Fast Food and Counter Workers	\$8.48	\$9.18	\$10.87	\$11.90	\$14.11
14	Office Clerks, General	\$9.33	\$10.86	\$15.17	\$18.15	\$23.62
15	Counter and Rental Clerks and Parts Salespersons	\$8.44	\$9.14	\$11.60	\$12.39	\$16.67
16	Self-Enrichment Education Teachers	\$9.31	\$11.47	\$19.23	\$25.39	\$31.78
17	Waiters and Waitresses	\$8.77	\$9.46	\$12.38	\$14.06	\$18.16
18	Grounds Maintenance Workers	\$9.38	\$10.83	\$13.49	\$15.21	\$19.24
19	Cooks	\$9.93	\$11.46	\$14.29	\$16.46	\$19.63
20	Cashiers	\$8.45	\$9.18	\$10.97	\$12.12	\$14.63

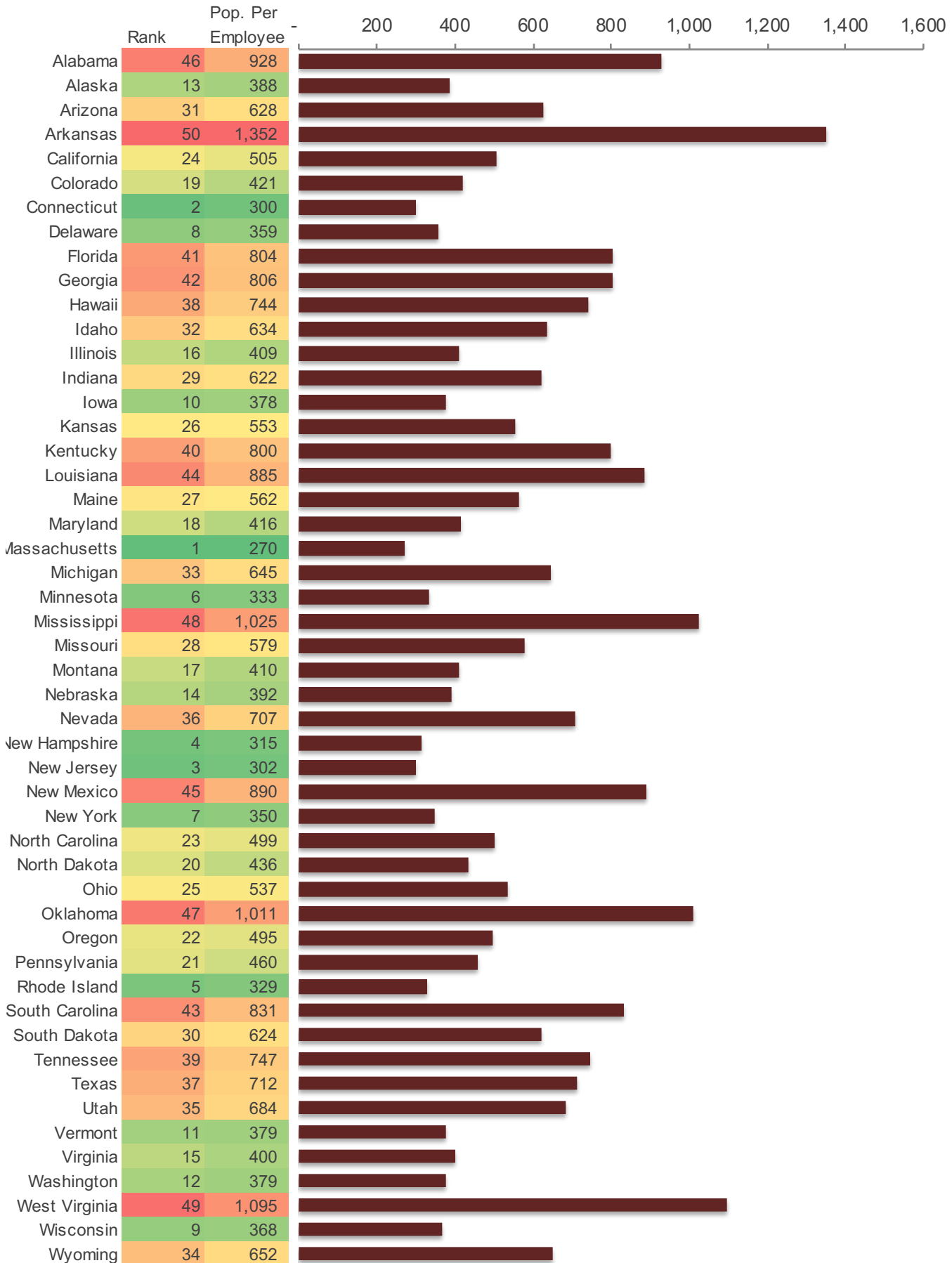
Total Employees by State

It is always good to know how large the industry talent pool is in a state. "No data" means there wasn't a sufficient sample size of data for the state.



State Population to Every Industry Employee

Below is the data set of the state residents per each industry employee by state. "No data" means there wasn't a sufficient sample size of data for the state.



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