



**International SPA Association**



**ISPA 2008  
U.S. Spa Industry  
Update**

*The Big Five*



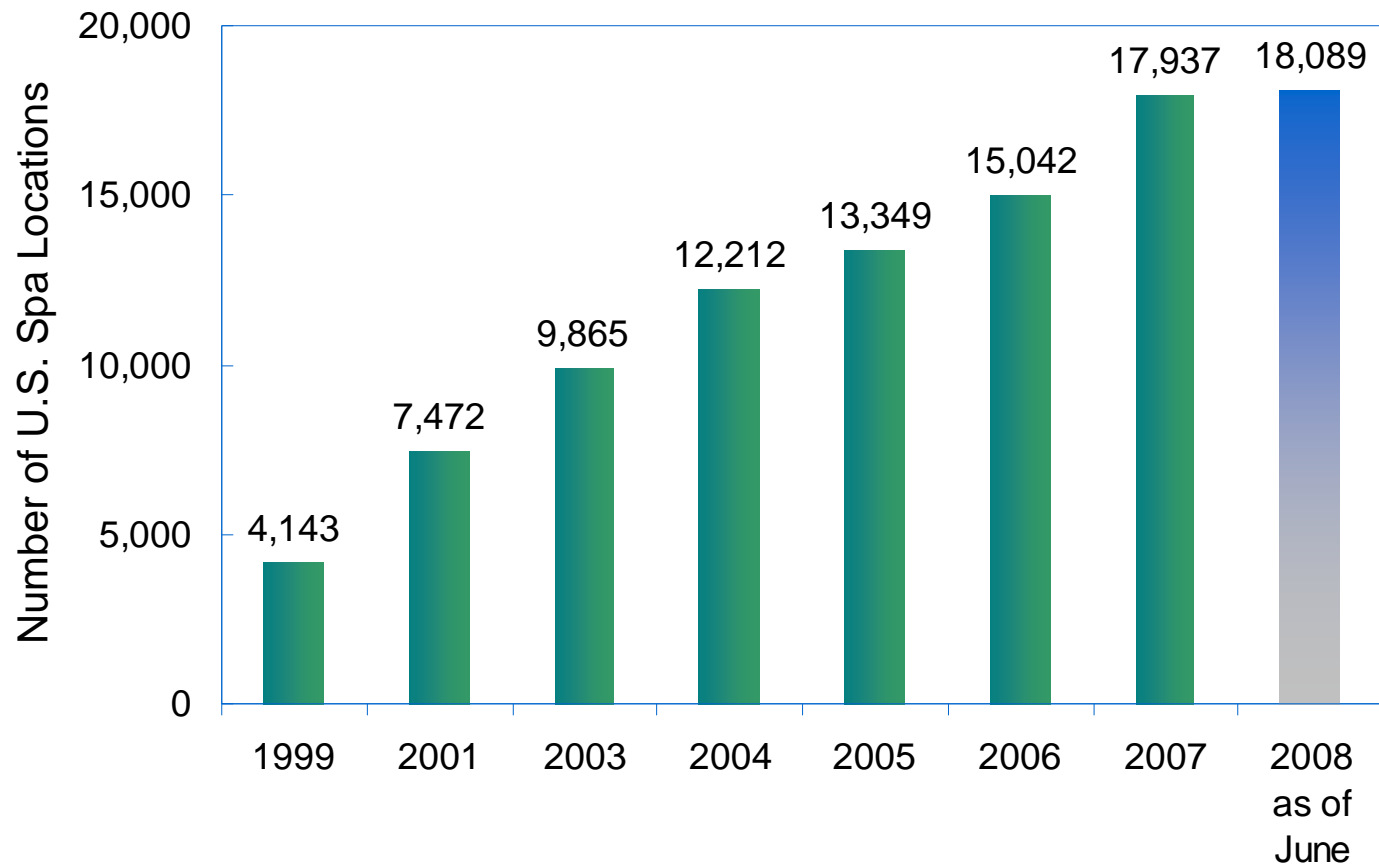
# ISPA 2008 U.S. Spa Industry Update

## *The Big Five*

	2006	2007	Annual Growth
Revenue	\$9.4 billion	\$10.9 billion	16%
Spa Visits	111 million	138 million	25%
	July 2007	June 2008	Annual Growth
Locations	14,600	18,100	24%
Total Employees	232,700	303,700	31%
Full-Time	117,100	143,200	22%
Part-Time	73,100	112,000	53%
Contract	42,500	48,500	14%
Square Footage	56.2 million square feet	59.9 million square feet	7%

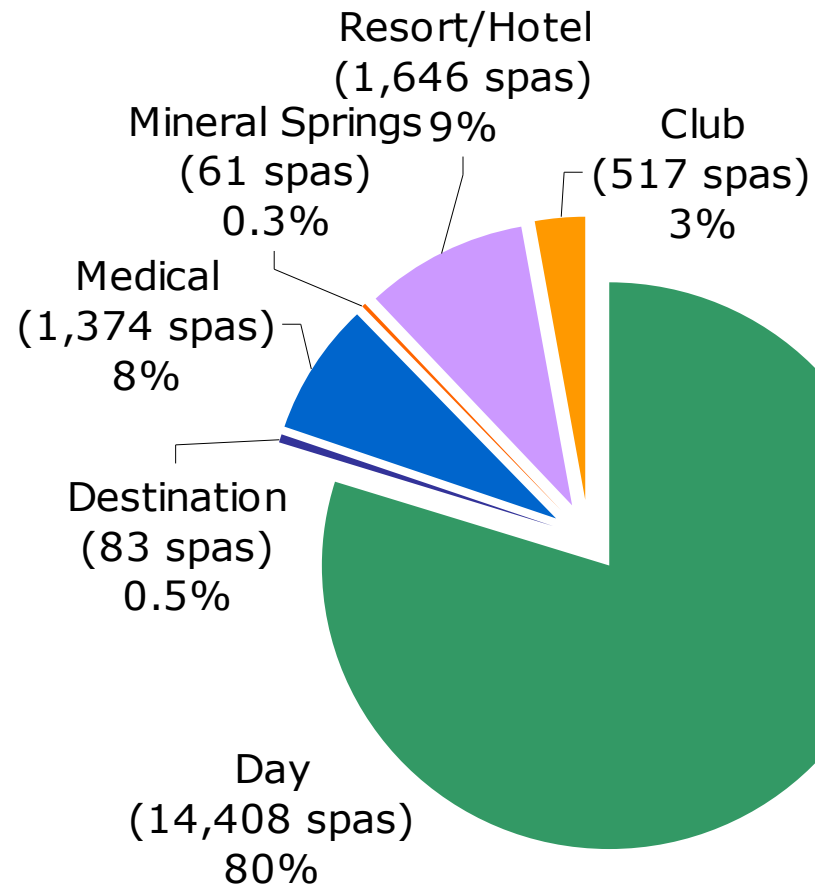


# The Number of Spas in the U.S. Continues to Grow





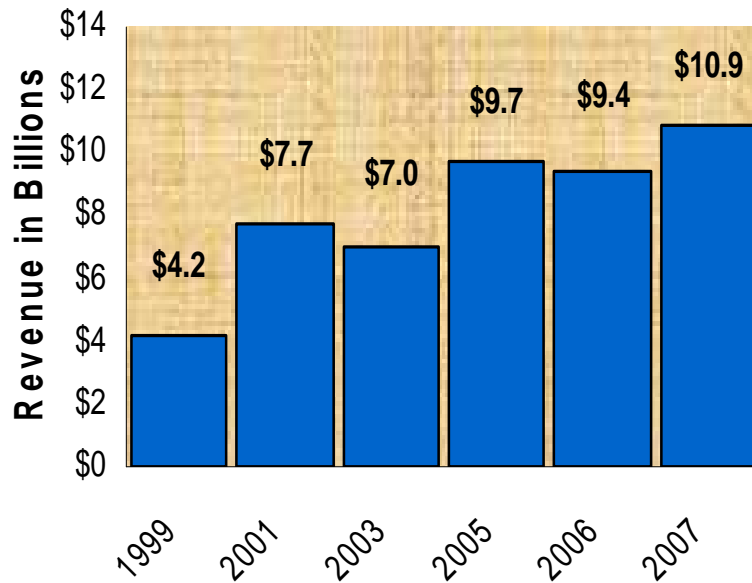
# Spa Establishments by Type Remains Consistent



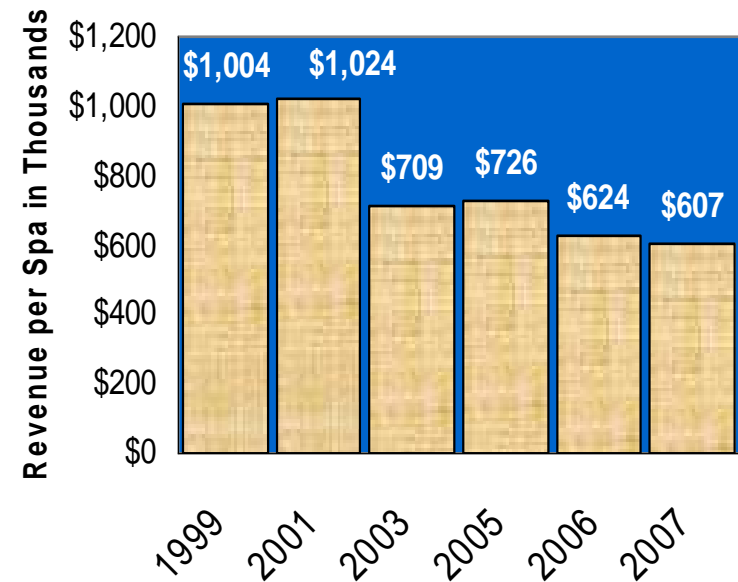


# Spa Industry Revenues in the U.S. Climb to Record High

### Industry Revenue (in billions)



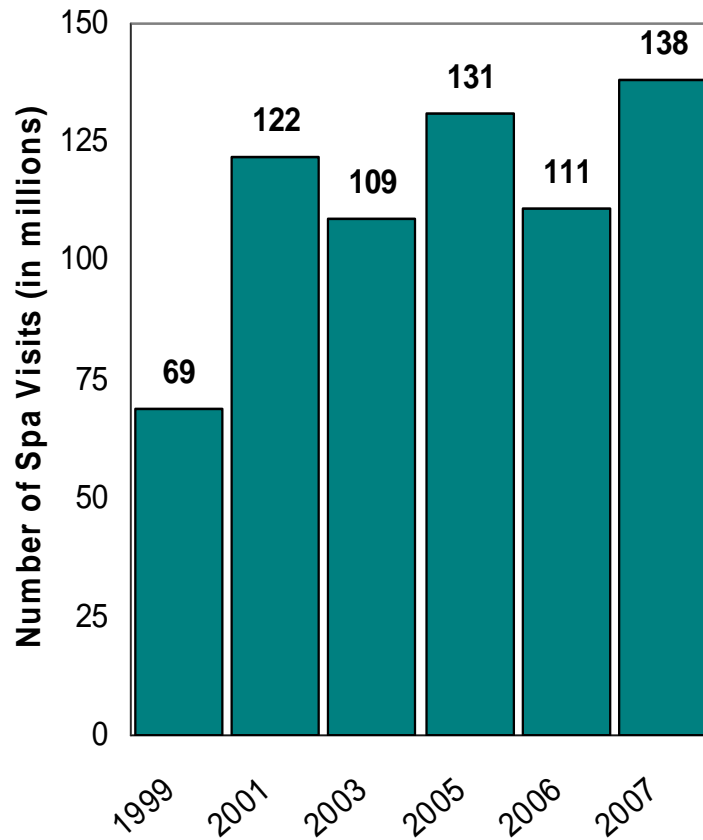
### Revenue Per Establishment (in thousands)



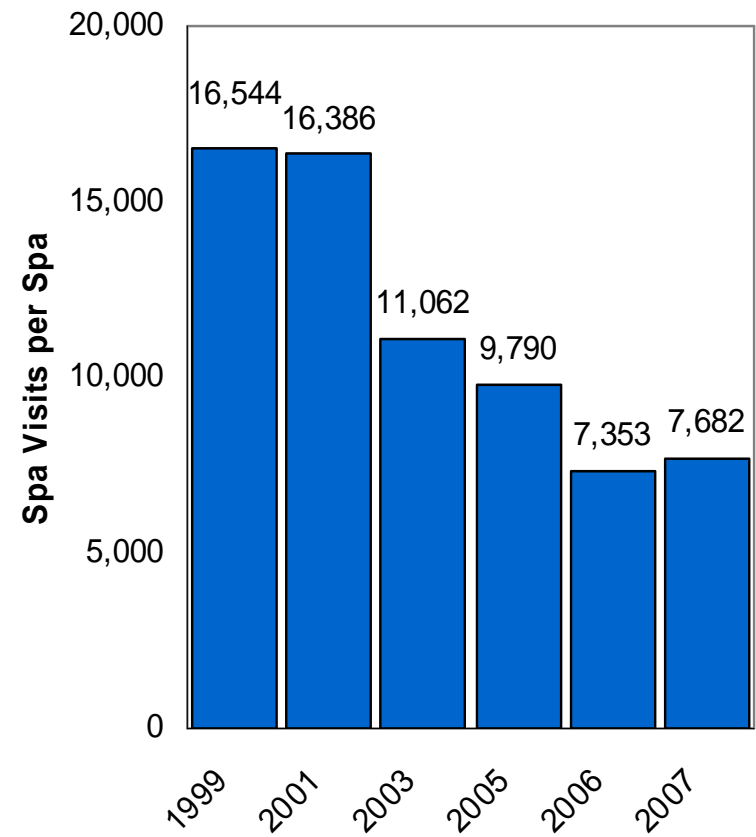


# Industry Spa Visits Increase by 25%

## Spa Industry Visits



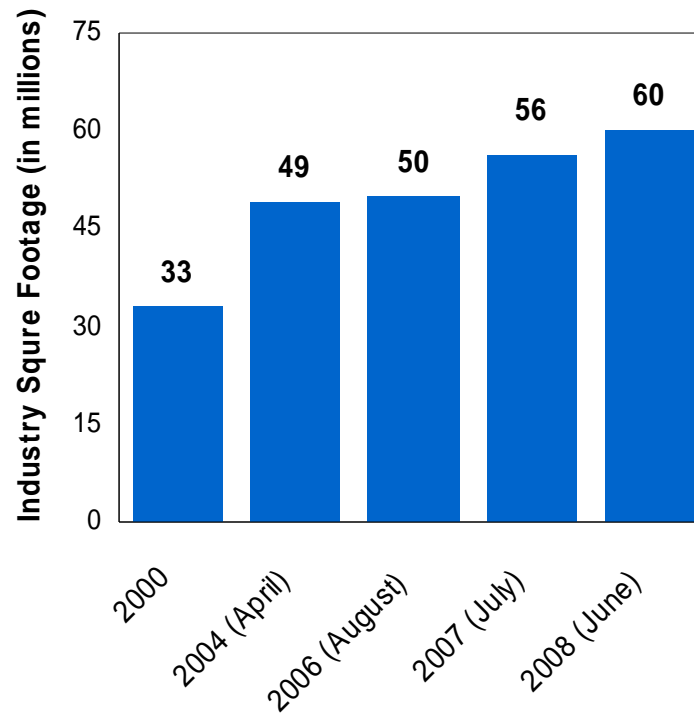
## Visits per Establishment



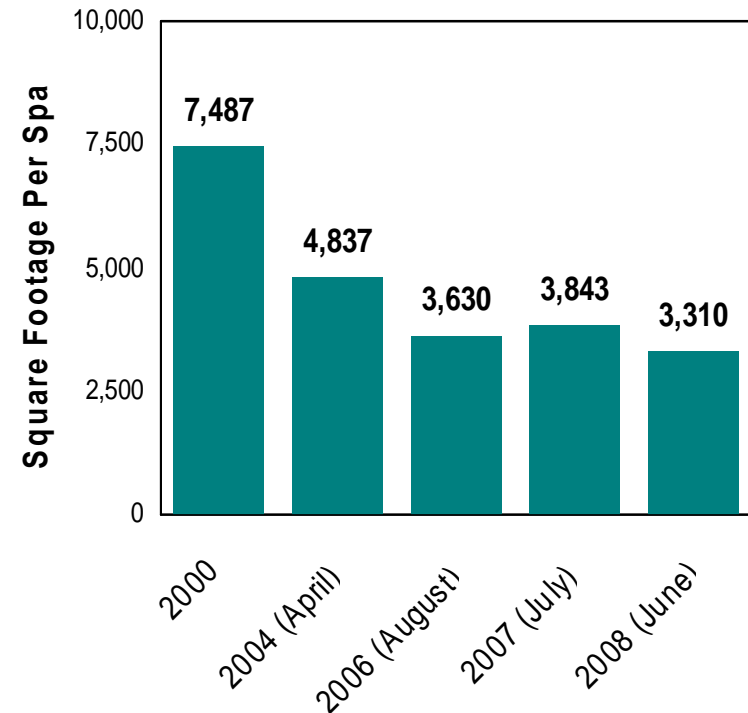


# Industry Square Footage Grows With Locations

## Industry



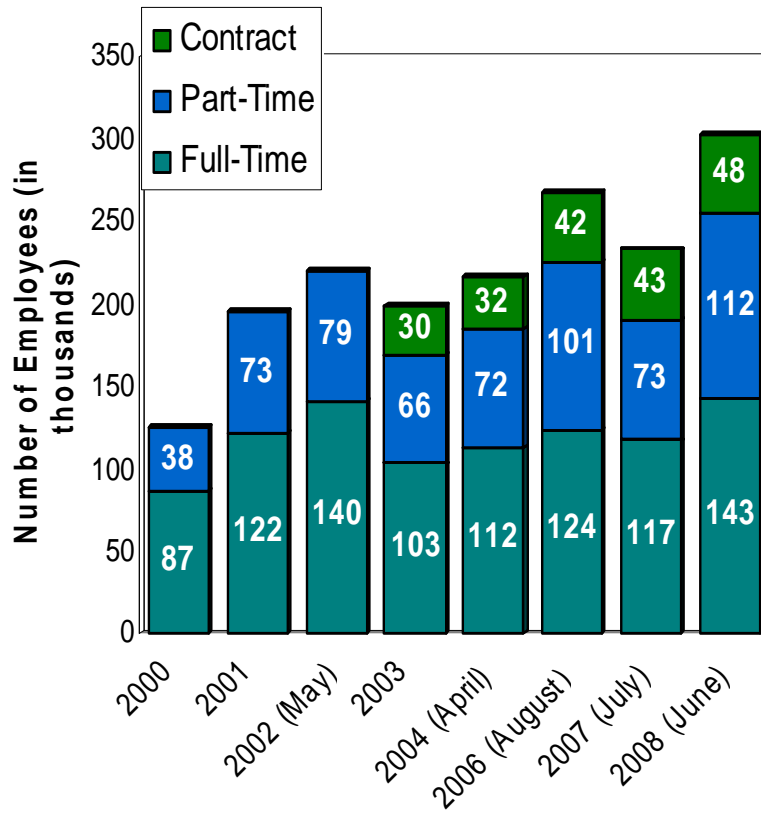
## Per Spa



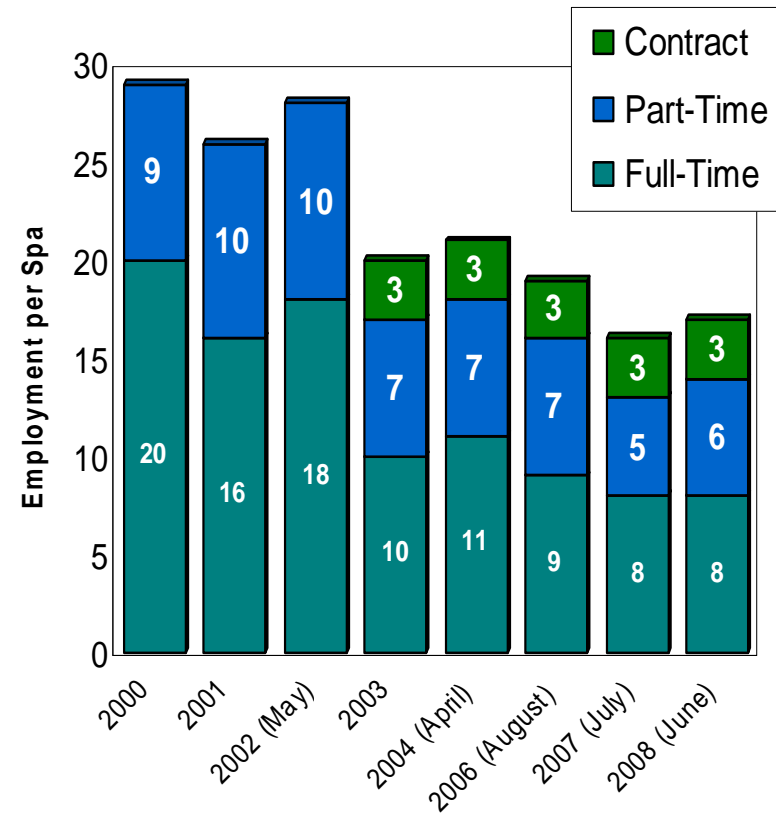


# Spa Industry Employment Grows as the Number of Spas Increase

## Spa Industry Employment



## Employment per Establishment





# ISPA 2008 U.S. Spa Industry Update Highlights

---

- **The number of spa locations in the United States has grown at a robust annual average of 20% in the last eight years.**
- **Location growth continues to outpace revenue growth.**
- **Visits per spa have leveled out (instead of declining for the first time since 2001), which combined with the slowing decline in per-spa revenue may be an indicator that the industry is turning a corner at the per-spa level.**
- **Total industry revenues have been growing at an average rate of 13% per year since 1999.**
- **The rising number of spas and increased consumer demand led to an increase in overall industry employment of 31%.**



# ISPA Members vs. Nonmembers

---

- **Average annual visits per spa for ISPA members came in at 16,900 versus 6,900 visits for nonmembers in 2007.**
- **More visits equals more business and revenue for ISPA members. Average annual revenue for members remained significantly higher when compared to nonmembers.**
- **It literally pays to be an ISPA member. The average revenue per visit for ISPA members is \$175, compared to only \$121 for nonmembers.**



### **About the International SPA Association**

ISPA is recognized worldwide as the leading professional organization and voice of the spa industry. Founded in 1991, ISPA's membership is comprised of more than 3,200 health and wellness facilities and providers from 82 countries. ISPA advances the spa industry by providing invaluable educational and networking opportunities, promoting the value of the spa experience and speaking as the authoritative voice to foster professionalism and growth. For more information on ISPA, write to, call or e-mail: 2365 Harrodsburg Road, Suite A325, Lexington, KY 40504, USA Domestic Telephone: 1.888.651.4772 or Direct: 1.859.226.4326 or E-mail: [ispa@ispastaff.com](mailto:ispa@ispastaff.com)

### **About the Association Resource Centre Inc.**

The Association Resource Centre Inc. is a full-service management consulting firm that specializes in meeting the diverse needs of the not-for-profit sector. Through its Research and Strategy Division, the firm provides a broad range of research services to associations and to the members they serve. The Association Resource Centre's extensive background in governance, strategic planning and association research enables it to interpret the data it receives and to provide insightful analysis as to what the data means. Core team members from the Association Resource Centre Inc. have played lead roles in all of ISPA's North American industry research since the inaugural study in 2000.



### **Disclaimer**

Although the information in this update has been obtained from sources that the Association Resource Centre Inc. believes to be reliable, its accuracy and completeness cannot be guaranteed. This update is based on survey responses of spa establishments. This update is for information purposes only. All opinions and estimates included in this report constitute the views of survey respondents combined with our judgment as of this date and are subject to revision.

Surveys for this study were conducted by Association Resource Centre Inc. in June 2008. The survey was completed by 807 (605 via random telephone survey and 202 via Internet survey) U.S. spa owners and managers. Estimates are by nature subject to error. It is important to note that all opinions and estimates included in this update constitute the views of survey respondents combined with Association Resource Centre Inc.'s judgment as of this date and are subject to revision.

### **Copyright**

This document contains proprietary information of the International SPA Association. No disclosure or use of any portion of the contents of this material may be made without the express written consent of ISPA. For permission to reproduce any material contained in this publication, please call ISPA at 1.859.226.4326. If consent is granted, attribution to ISPA and other sources specified in the document should be made. All rights reserved. ©2008