

INTERNATIONAL SPA ASSOCIATION



---

# ISPA 2014

---

## U.S. SPA INDUSTRY STUDY

---

BACK ON TRACK





## Table of Contents

### Introduction

Pg 2: Introduction  
Pg 3: Research objectives  
Pg 4: Definitions  
Pg 5: Structure of the report

### Industry Size: Back on Track

Pg 8: Economic context  
Pg 9: The Big Five Statistics  
Pg 17: Recent demand trends  
Pg 20: Profitability  
Pg 22: Key challenges and looking ahead  
Pg 24: Key points summary

### Spa Services and Facilities

Pg 28: Total square footage  
Pg 29: Indoor square footage: Elements  
Pg 31: Product offering: Core spa services  
Pg 33: Price per service  
Pg 35: Retail products  
Pg 36: Spa treatment offerings and packages  
Pg 40: Company websites and online bookings  
Pg 41: Gift card revenue  
Pg 42: Plans for 2014

### Spa Industry Profile

Pg 45: Key ratios  
Pg 47: Big Five: Composition by spa type  
Pg 48: Regional patterns  
Pg 51: Year spa business started  
Pg 52: Type of operation

### Technical Appendix

Pg 55: Survey methodology  
Pg 56: The questionnaire  
Pg 57: Survey outcomes  
Pg 58: Comparability over time





## Introduction

This report presents the findings from the 2014 U.S. Spa Industry Study. The study was commissioned by the International SPA Association (ISPA) Foundation.

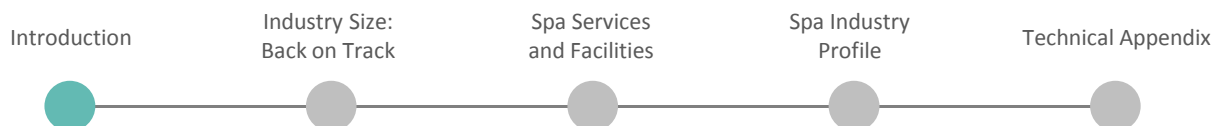
Established in 1991, ISPA has been recognized worldwide as the professional organization and voice of the spa industry, representing health and wellness facilities and providers in more than 70 countries. Members encompass the full spectrum of the spa experience, from resort/hotel, destination, mineral springs, medical, cruise ship, club and day spas, to service providers such as physicians, wellness instructors, nutritionists, massage therapists and product suppliers.

ISPA advances the spa industry by providing educational and networking opportunities, promoting the value of the spa experience and speaking as the authoritative voice to foster professionalism and growth.

This 2014 study marks the fifteenth anniversary of the ISPA U.S. Spa Industry Study which was first conducted in 2000 highlighting the spa industry in 1999. The inaugural study was subsequently updated in 2002, 2004, 2006, 2007, 2010, 2011, 2012 and, most recently, 2013. Shorter tracking studies were commissioned in 2003, 2005, 2008 and 2009.

This report presents the state of the industry in 2013, as indicated by the change in revenues, spa visits, average revenue per visit, the number of spa locations and staffing levels. These are referred to as the 'Big Five' statistics.

The 2014 Survey also collected information on compensation levels of full-time employees in the spa industry, provision of benefits to employees and unfilled service provider positions. Those topics are the subject of a separate supplementary report, which is being provided only to survey respondents.

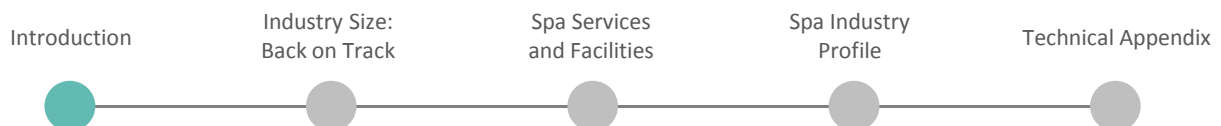




## Research Objectives

The research objectives of the 2014 U.S. Spa Industry Study are as follows:

- Determine the size of the spa industry in the United States; specifically in terms of the 'Big Five' statistics:
  - Number of establishments;
  - Revenues;
  - Number of visits;
  - Revenue achieved per visit; *and*
  - Employment.
- Estimate the growth rate of the industry.
- Determine current and future industry trends and challenges.
- Develop a profile of the U.S. spa industry using criteria such as regional distribution, spa type, ownership structure and service/product offerings.
- Evaluate compensation levels of full-time employees within the spa industry. A separate supplementary report has been prepared on that topic.
- Manage the ISPA database of key industry statistics.





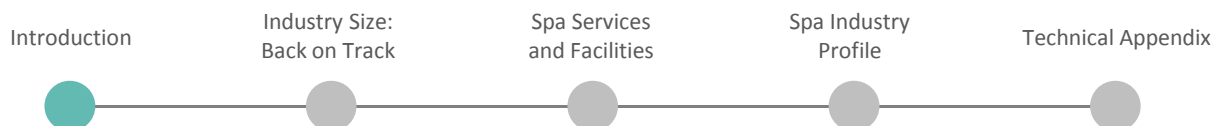
## Definitions

For the purpose of the ISPA study, a spa is defined as a place of business that enhances the overall well-being of a person through a variety of professional spa services that encourage the renewal of mind, body and spirit. To be qualified as a spa, a business must offer at least two of the following three services: massage (full body); skin care treatments (i.e., facials); or body treatments (i.e., hydrotherapy or body wraps/scrubs).

The spa industry categories used in this study are as follows:

- Club spa: Primary purpose is fitness, offers a variety of spa services on a day-use basis.
- Day spa: Offers spa services to clients on a day-use basis.
- Destination spa: Historically a seven-day stay, encompassing spa services as part of a program whose primary purpose is guiding individual spa-goers to develop healthy habits.
- Medical spa: Operates under the full-time on-site supervision of a licensed health care professional. Primary purpose is to provide comprehensive medical and wellness care in an environment that integrates spa services.
- Mineral springs spa: Offers on-site source of natural mineral, thermal or sea water used in professionally administered hydrotherapy services.
- Resort/Hotel spa: A spa located within a resort or hotel.

Throughout the report data is analyzed by type of spa. Day and resort/hotel spas are generally listed with the remaining spas combined into the 'other' spa category, due to their sample sizes in the survey undertaken for this study.





## Structure of Report

The remainder of the report is structured as follows:

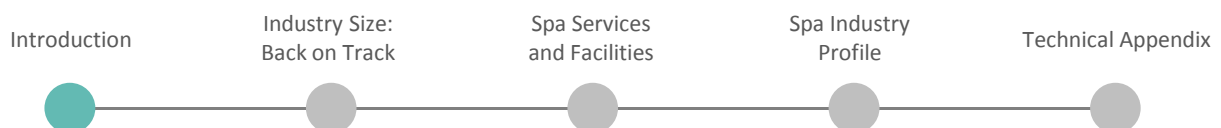
**Section 2 Industry Size – Back on Track:** This Section provides an industry level overview and commences with the 2014 Industry Study findings for the ‘Big Five’ statistics. It then reviews recent trends in key business indicators before concluding with a summary of the key issues facing the industry as identified by respondents to the 2014 survey.

**Section 3 Spa Services and Facilities:** This Section presents a picture of the facilities and services that spas offer to their visitors. This Section comprises five main parts, including the main elements of indoor space occupied by spa establishments, core spa services, the retail component and the programs and treatment offerings that spas had in place in 2013, including gift card promotions. This Section concludes by reporting on what spas said they plan to add or create in 2014.

**Section 4 Spa Industry Profile:** This Section presents a profile of spa establishments, including composition by type of spa, size differences and the geography of the industry.

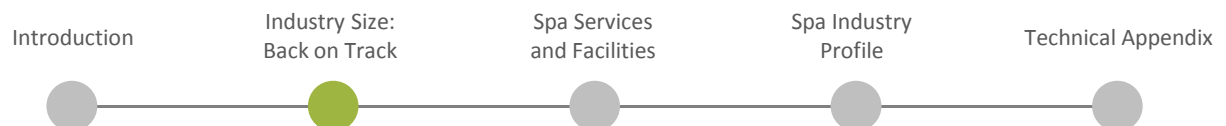
**Section 5 Technical Appendix:** This Section contains some more detailed information on how the survey was undertaken.

*Note: All percentage calculations are based on un-rounded figures; therefore, totals or sub-totals may differ due to rounding.*





## Section 2 | Industry Size: Back on Track





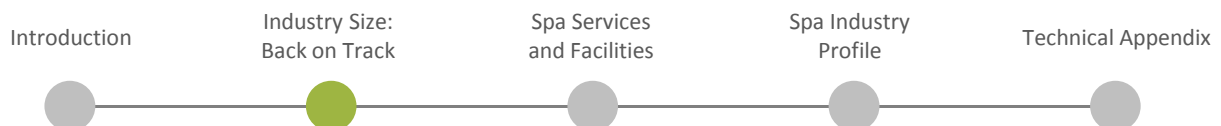
## Section 2: Introduction

**This Section presents the survey findings for the size of the U.S. spa industry.**

The following topics are addressed:

- What is the size of the spa industry in the U.S., as measured by revenues, visits, locations and employment?
- What is the average revenue per client visit?
- What are the more recent trends in client visits, spending per client visit, revenue, staffing and profitability?
- What are the key issues facing the industry in 2014, according to the survey respondents?

This Section commences with an overview on the national economic context, especially the pace of growth in the U.S. economy during 2013 and into 2014.







## The Economic Context

**The national economy has steadily improved, providing a positive context for the spa industry.**

The Gross Domestic Product (GDP), which measures the value of economic activity nationwide, expanded at a modest pace in 2013 (2.2%).

However, employment has continued to rise (+1.7% in 2013) and unemployment has remained on a downward trajectory (an average of 7.4% in 2013 compared to 8.1% in 2012).

The growth in numbers at work was accompanied by growth in the compensation of employees (+2.8% in 2013), a key driver of consumer spending.

Expenditure on consumer services rose by +4% in cash terms in 2013 and +1.9% after adjusting for price inflation.

### The U.S. economy:

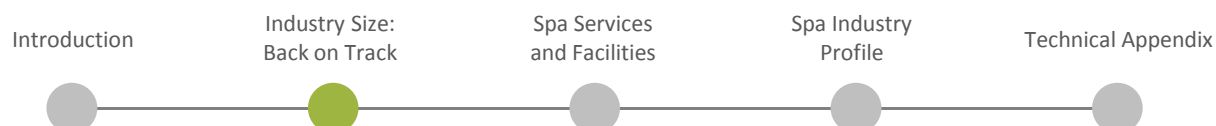
Selected indicators, annual percent change

	2012	2013	2014(Q2)
GDP (Constant 2009 \$)	2.3%	2.2%	4.0%
Employment	1.7%	1.7%	1.8%
Unemployment	8.1%	7.4%	6.2%
<b>Compensation of Employees</b>			
Current \$	4.1%	2.8%	5.9%
<b>Personal Consumption Expenditure *</b>			
All services			
Current \$	3.5%	4.0%	3.1%
Constant (2009) \$	1.3%	1.9%	0.7%
<b>Consumer Price Index</b>			
All items	2.1%	1.5%	1.7%

Sources: Bureau of Economic Analysis (BEA); Bureau of Labor Statistics.

\*Personal consumption expenditure is a measure of how much consumers spend on durable goods, consumer products, and services. The figures shown above relate to spending on services.

GDP, income and expenditure data extracted from revised estimates published by BEA in July 2014. Rates shown in constant (2009) \$ are adjusted for inflation.





## The Big Five Statistics: 2013 Out-Turn and Percent Change Over 2012

In 2013, total spa industry revenue is estimated to have reached a record high of \$14.7 billion, representing a 5.1% increase on the 2012 out-turn. Consequently, the spa industry out-performed the wider U.S. economy in 2013. The 2013 revenue growth was due in approximately equal measure to increasing numbers of spa visits (+2.5%) and a rise in the average revenue per visit, up by 2.5% from \$87 in 2012 to \$89 in 2013. The total number of jobs in the spa industry is estimated to have increased from 343,600 in May 2013 to 349,900 in May 2014 (+1.8%) and now stands at its highest level since the inaugural 2000 Spa Industry Study. The number of spa locations is estimated to have passed the 20,000 mark, rising by 1.1% to 20,180.

	2012 (Year End)	2013 (Year End)	% Change
Revenue	\$14.0 billion	\$14.7 billion	5.1%
Spa visits	160 million	164 million	2.5%
Locations	19,960	20,180	1.1%
Revenue per visit	\$87	\$89	2.5%

	2013 (May)	2014 (May)	% Change
Total Employees	343,600	349,900	1.8%
Full-Time	151,300	148,300	-2.0%
Part-Time	145,400	157,000	8.0%
Contract	46,900	44,600	-4.9%



## Spa Establishments

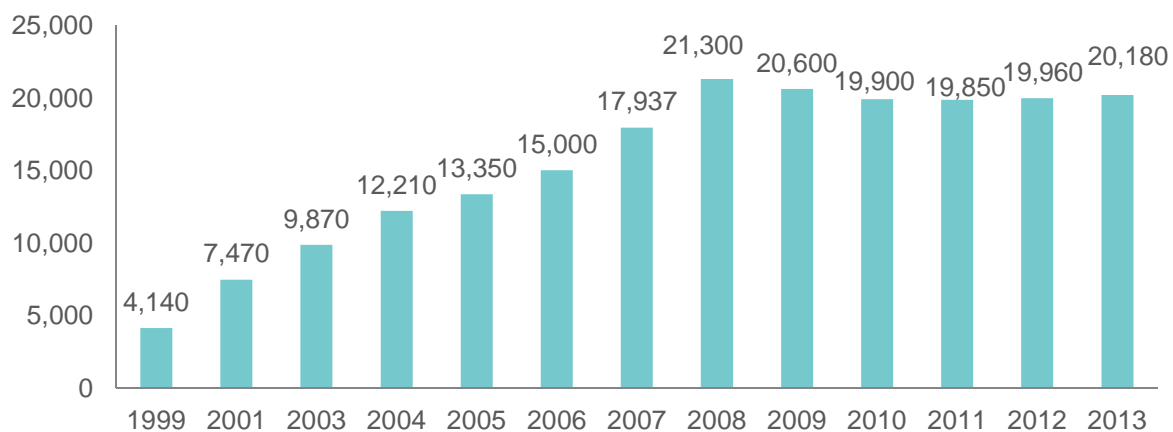
**Based on the latest industry study findings there are now over 20,100 spas located across the U.S. That represents a near five-fold increase on the estimated 4,140 spa establishments operating in the U.S. in 1999.**

The spa industry landscape has changed dramatically since the inaugural spa industry study. In 1999, there were 1.5 spas per 100,000 of the population. By the end of 2013 the ratio had increased to 6.4 spas per 100,000.

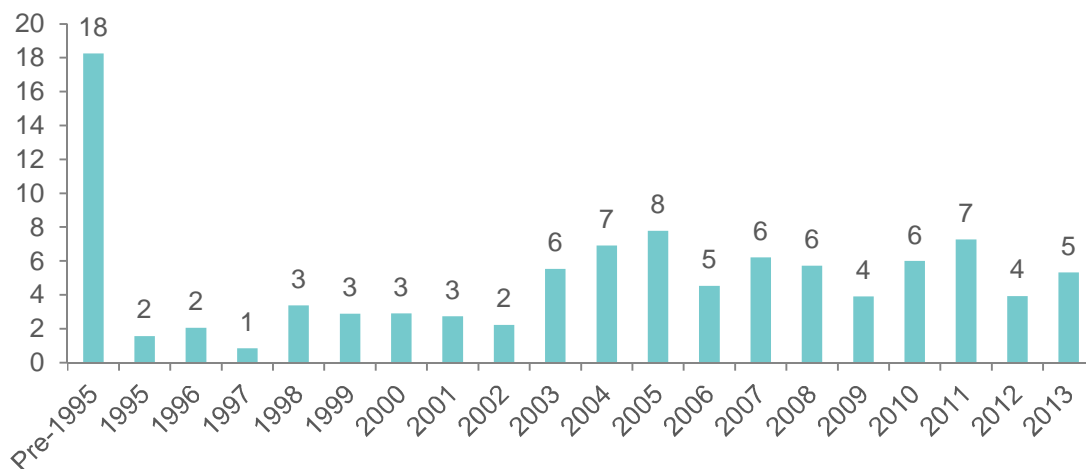
Compared to 1999, the spa industry is substantially larger and more widely dispersed across the U.S. Consequently, the spa experience is now much more accessible to consumers than was the case in 1999 when the sector was still at an early stage in its development.

In 2013, the number of spa locations remained on a rising trend, increasing by 1.1% and climbing back above the 20,000 mark which had first been reached in 2008.

**Total spa establishments in the U.S.**



**Year spa opened**





## Establishments by Type of Spa

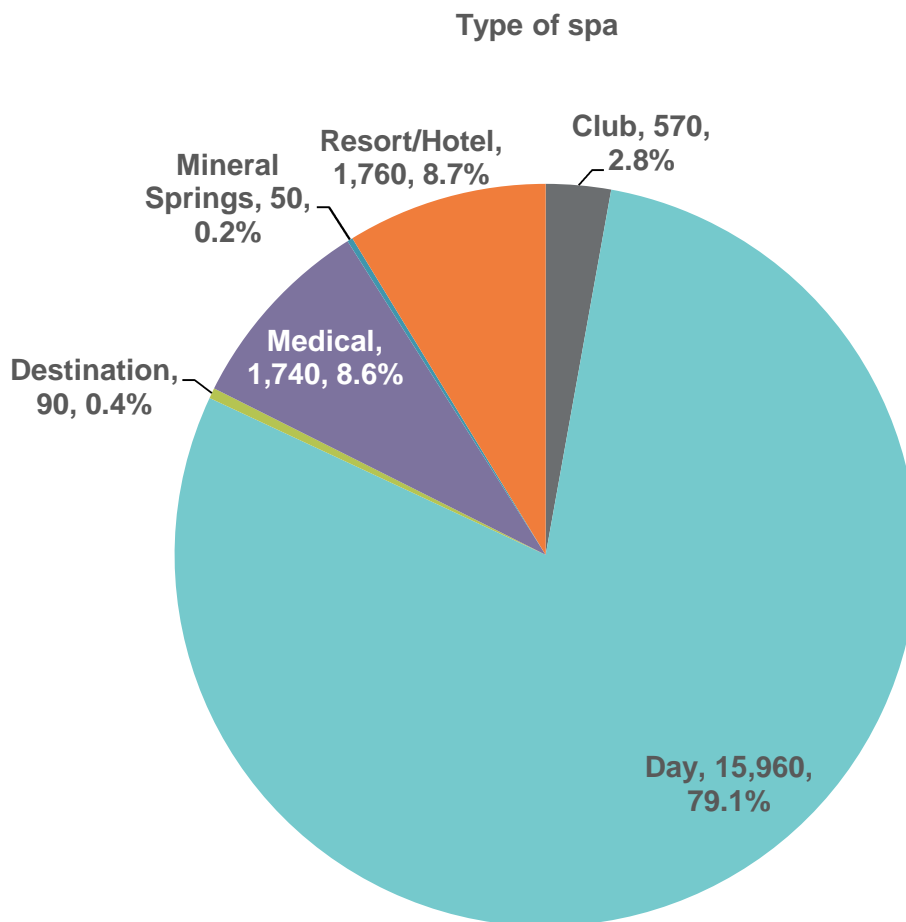
The composition of the industry in 2013 was very similar to previous years, with day spas continuing to account for 79% of establishments.

An estimated 15,960 day spa establishments were in operation at the end of 2013, an increase of +1.4% compared to the 2012 estimate (15,740).

The number of resort/hotel spas in 2013 is estimated at 1,760, slightly higher than the 2012 estimate (1,750).

The number of medical spas (1,740) is estimated to have fallen slightly compared to the 2012 position (1,760).

In the remaining categories, the estimated numbers of spas in 2013 were unchanged on their 2012 levels.





## Spa Revenues

**Total spa revenues for 2013 are estimated at \$14.7 billion, an increase of \$0.7 billion (+5.1%) on total revenue in 2012.**

Along with the rest of the U.S. economy, the sector experienced a sharp downturn in the course of the Great Recession 2008-2009. Since 2009, however, the sector has rebounded and the latest revenue estimates provide the strongest indication yet that the sector is now firmly back on a growth trajectory.

In cash terms, total revenues are now 20% in excess of the position in 2009 (\$12.3 billion) and 11% higher when account is taken of price inflation over that period.

Average revenues per spa rose to \$728,000 in 2013, an increase of 3.9%, marking the fourth consecutive year in which revenues per spa have increased.

**Total spa revenue in the U.S. (billions)**



**Average revenue per establishment (thousands)**





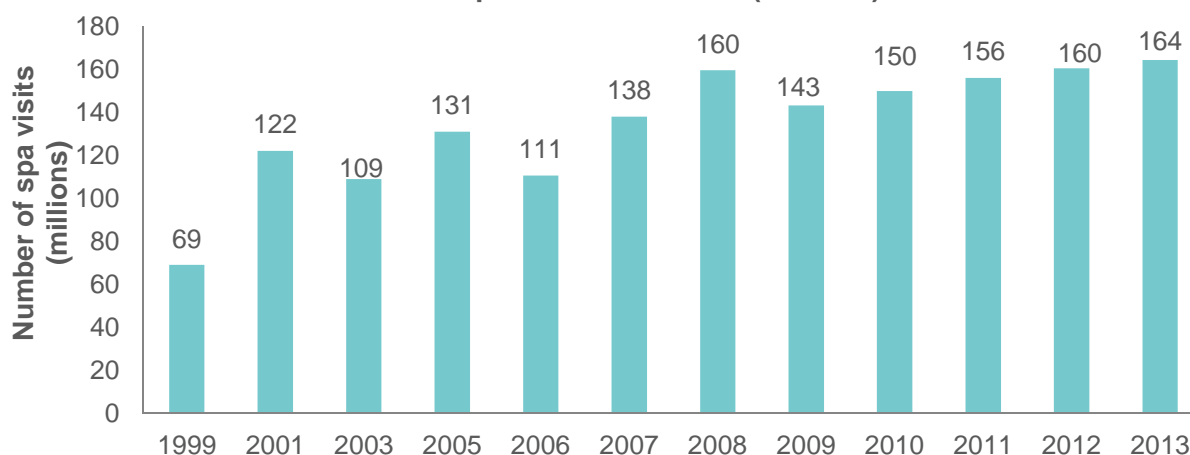
## Spa Visits

The total number of visits to spa establishments is estimated to have risen from 160 million in 2012 to 164 million in 2013, the highest level recorded since ISPA commenced tracking the spa industry in 1999 (69 million).

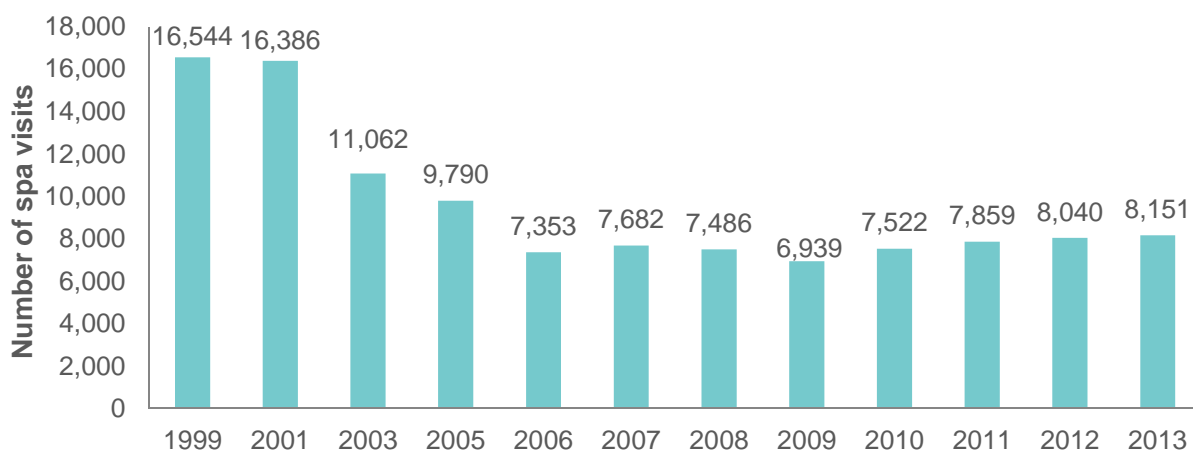
In 2013, spa visits were 2.5% higher than in 2012, making an important contribution to the 5.1% revenue growth achieved in the same period.

Average visits per spa rose to 8,151, representing a 1.4% increase on the 2012 level. The 2013 out-turn continues the rising trend that has been evident since 2009, when spa visits dipped below 7,000 in the wake of the Great Recession.

Total spa visits in the U.S. (millions)



Average visits per establishment





## Average Spa Revenue Per Visit

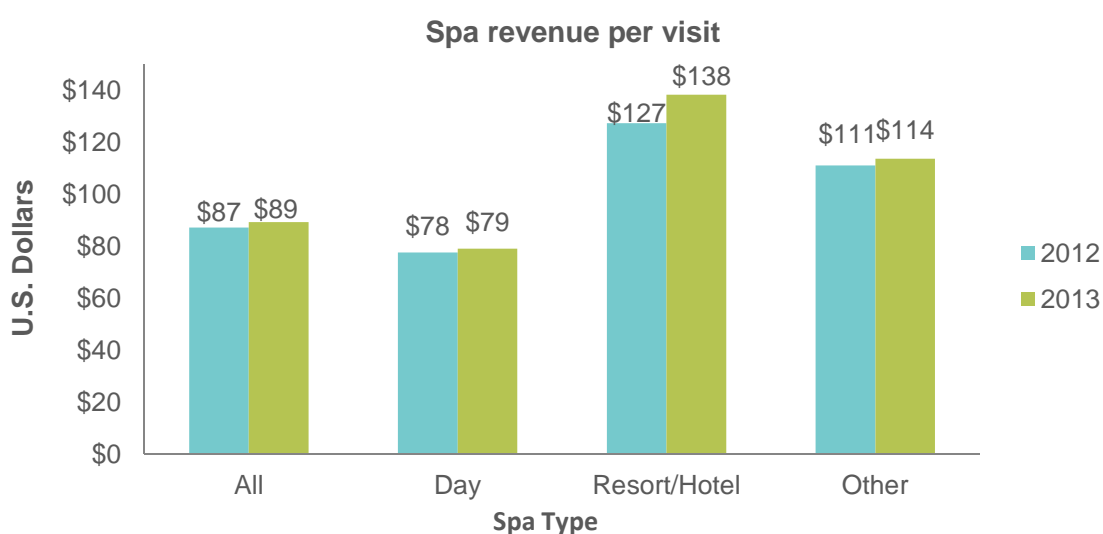
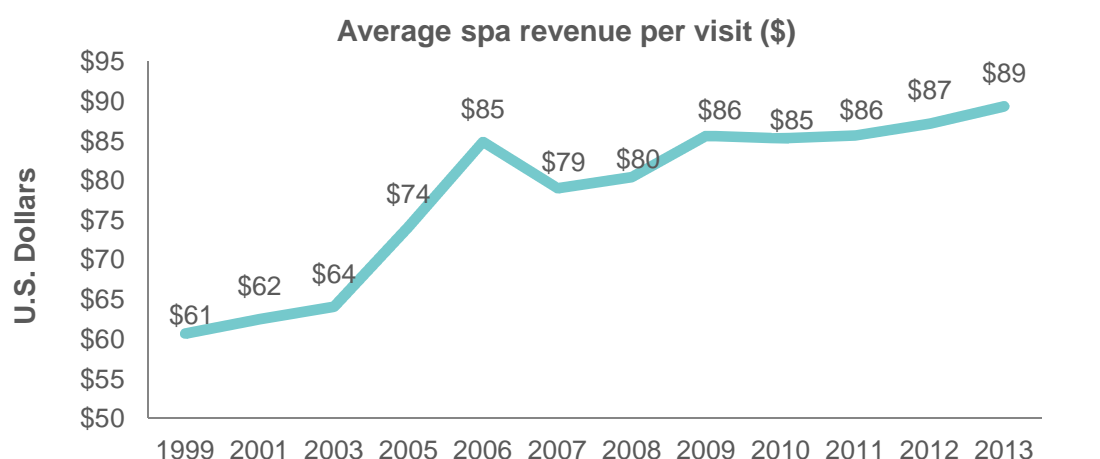
**Average revenue per visit in 2013 was \$89, an increase of 2.5% compared to 2012. The average revenue per visit ranged from \$79 in day spas to \$138 in resort/hotel spas.**

Alongside the rise in the number of spa visits, the 2.5% increase in average revenue per visit was an important contributory factor to the revenue growth achieved in 2013.

It can also be noted that the 2.5% growth in average revenues outpaced the increase in the consumer price index in 2013 (+1.5% - see table, page 8). This had not been the case in the period from 2010 through 2012.

The trend in the average revenue per visit will reflect a range of influences, such as the mix of services that clients purchase.

The strategies that spas adopt in response to prevailing economic conditions will also affect the average revenue per visit, including the price per service, changes in spa offerings (i.e., introduction of shorter treatments) and the use of incentives (i.e., discounting). These factors are further examined in subsequent sections of this report.





## Employment

The total number of jobs in the spa industry is estimated to have increased from 343,600 in May 2013 to 349,900 in May 2014 (+1.8%). The number in employment in the spa industry now stands at its highest level since the original 2009 Industry Study.

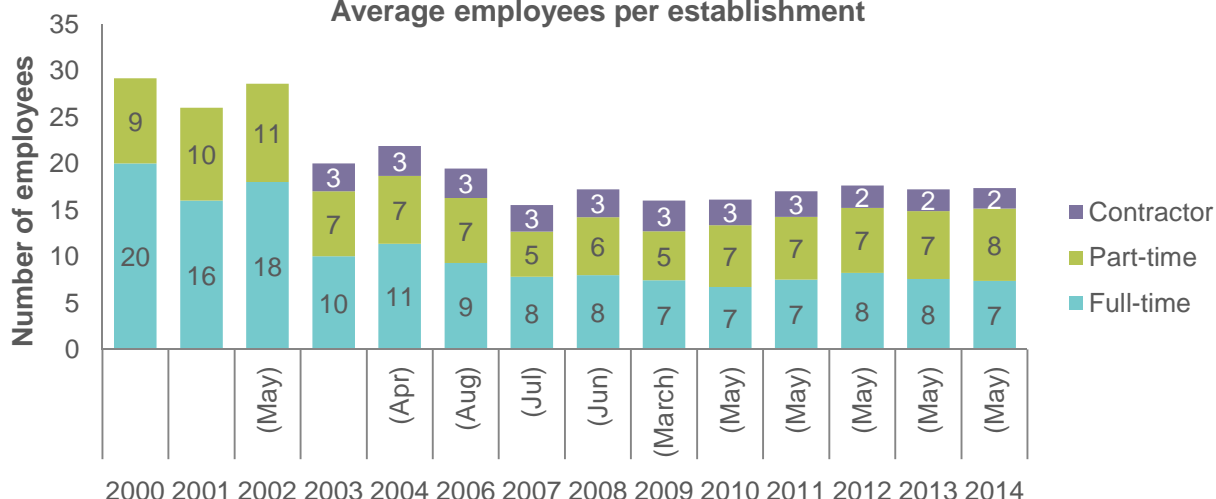
As in 2013, the rising employment level was due to expansion of the part-time workforce, up by 8% compared to an estimated fall of 2% among full-time workers.

As a result, in 2013 the part-time level exceeded the full-time level for the first time since employment levels were first estimated by the industry study. It should, however, be noted that the part-time share of the spa workforce has been rising consistently over that period, from a baseline of 30% in 2000.

Total employees in the U.S. (thousands)



Average employees per establishment



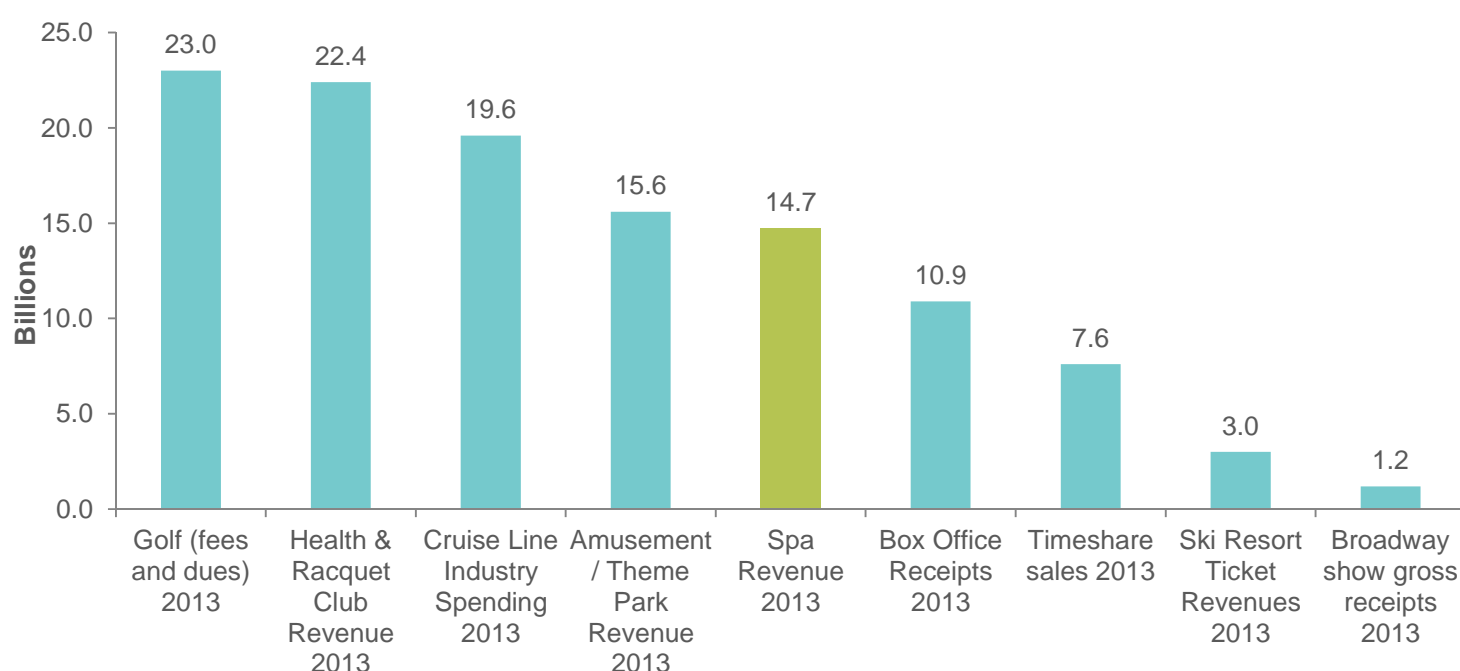




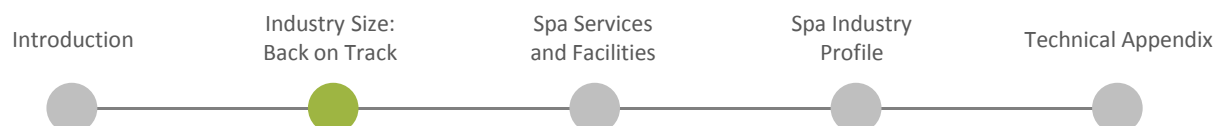
## Comparative Size of the Spa Industry

The accompanying chart shows the size of the spa industry in 2013 compared with the estimated sizes of other U.S. leisure industries, as measured by annual revenues. With revenues of \$14.7 billion in 2013, the spa industry falls within the middle of the size range of leisure industries shown below. With estimated growth of 5.1%, the growth in the spa sector was ahead of Health and Racquets Club revenue (+2.8%) and below the growth in Cruise Line industry spending (+7.2%).

Estimated Sizes of U.S. Leisure Industries



Sources: American Resort Development Association; Cruise Lines International Association; Broadway League; IBISworld; International Health, Racquet and Sportsclub Association; Motion Picture Association of America, Hospitality Net





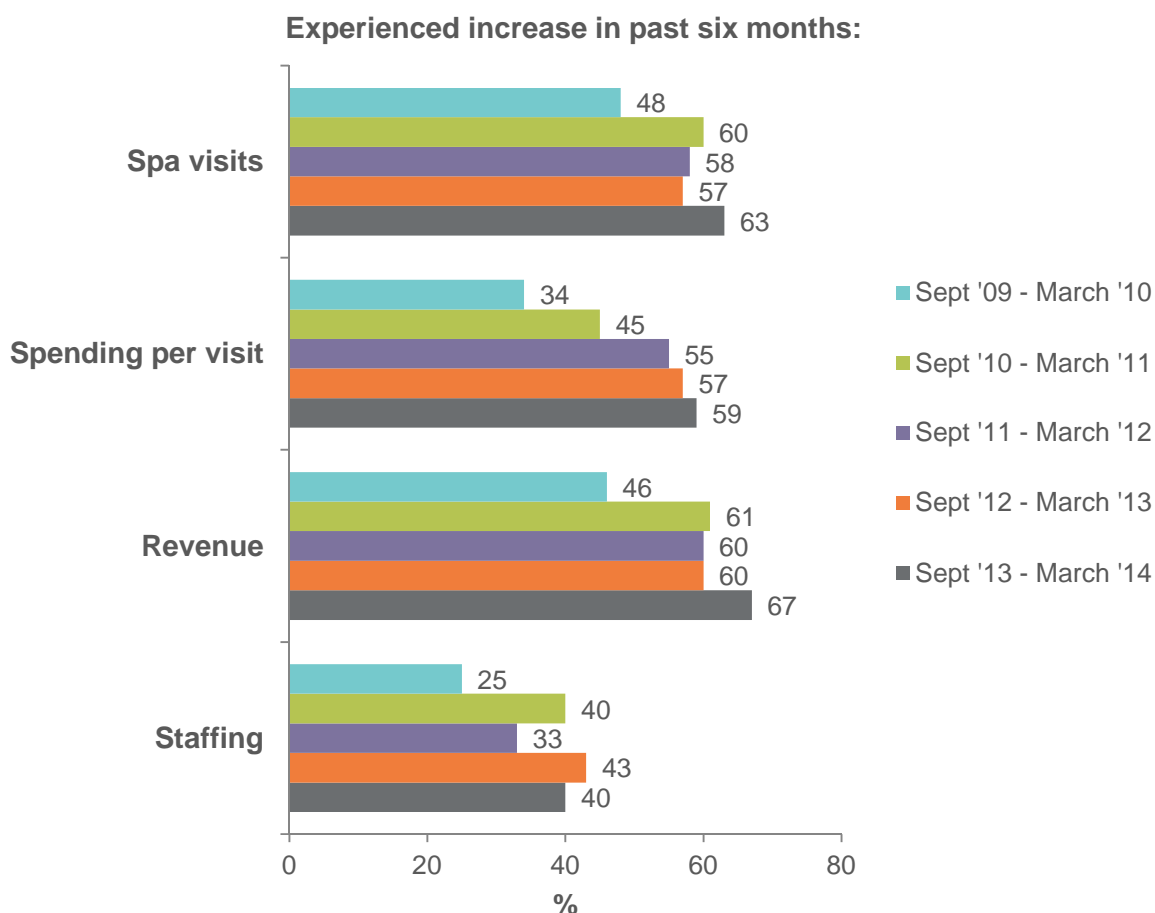
## Recent Demand Trends

When asked about their more recent experience in the six months prior to the survey (September 2013 to March 2014), a majority of spas reported an increase in revenue (67%), visits (63%) and client spending per visit (59%). Each of those demand indicators showed little change from 2013, suggesting that prospects for 2014 remain in positive territory.

The employment outlook is also encouraging. Spas were twice as likely to report an increase in staffing levels (40%) compared to the proportion saying that staffing levels had been decreasing (19%).

In order to gauge more recent trends in the industry, survey respondents were asked to say whether, in the period from September 2013 to March 2014, they had experienced an increase, decrease or no change in relation to client visits, spending, revenue and staffing levels, when compared to the same period the previous year. The results by spa type are reported in the following pages.

**Summary of experience in the past six months (September 2013 to March 2014) compared to the same periods in 2009-2010, 2010-2011, 2011-12 and 2012-13**





## Recent Demand Trends by Spa Type

The survey results for recent demand trends by type of spa are shown in the table on the following page. The key message is the continuation of positive trends across the different spa types, as follows.

### Spa visits

In the six months from September 2013 to March 2014, a majority of spas (63%) said they were experiencing an increase in the number of visits, well in excess of the proportion reporting a decrease (20%).

The proportion reporting an increase in visits did not vary greatly by type of spa.

### Client spending per visit

Resort/hotel spas were most likely to say that client spending had increased in the previous six months (63%), followed closely by day spas (60%).

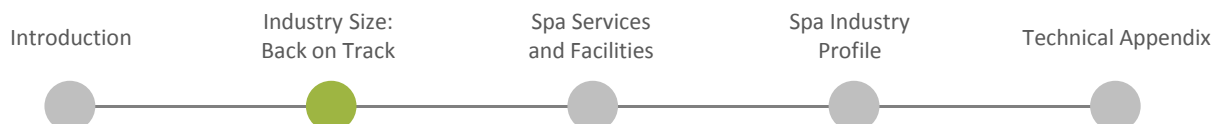
### Revenues

Driven by the positive trends in both spa visits and client spending per visit, over two in three spas (67%) said that revenues had increased in the past six months compared to the same period one year previously.

Day spas were slightly less likely than the average to report a rising trend in revenues (65%). Over seven in ten resort/hotel spas (71%) said revenues were increasing.

### Staffing levels

The employment outlook is encouraging across the spa types, with increasing employment levels reported by 36% of day spas, 44% of resort/hotel spas and 58% of spas in the 'other' category. Staffing issues, including unfilled positions and compensation levels, are examined in greater detail in the Compensation Supplement, published separately.





## Recent Demand Trends

Experienced increase in past six months (September 2013 to March 2014):

Spa visits	All	Day	Resort/Hotel	Other
Decreased	20%	20%	22%	18%
No change	16%	16%	13%	21%
Increased	63%	64%	65%	60%
Client spending per visit				
Decreased	16%	15%	16%	20%
No change	25%	26%	20%	24%
Increased	59%	60%	63%	56%
Revenue				
Decreased	21%	22%	21%	18%
No change	12%	13%	8%	10%
Increased	67%	65%	71%	72%
Staffing levels				
Decreased	19%	19%	16%	17%
No change	42%	45%	40%	25%
Increased	40%	36%	44%	58%



## Profitability

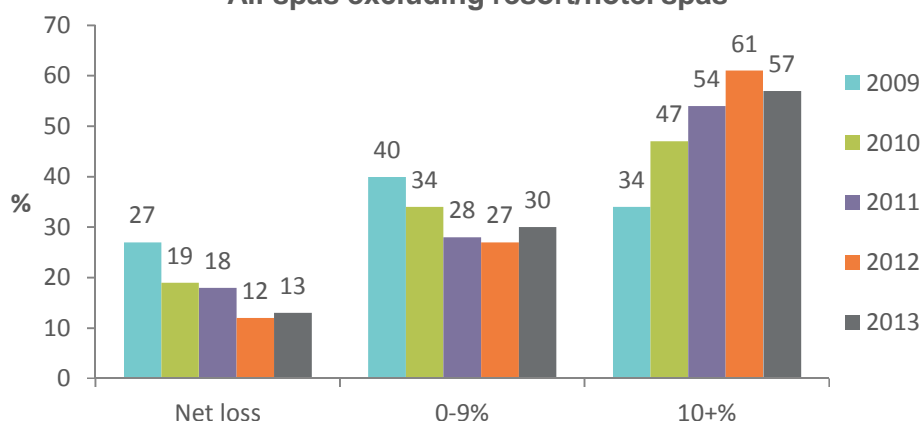
**Overall, profitability levels were little changed in 2013 compared to 2012. This would suggest that profitability in the spa sector has stabilized following the reduced levels observed in the wake of the Great Recession.**

Excluding the resort/hotel sector, almost six in ten spas (57%) reported a 2013 profit percentage in excess of 10%, a slight decline compared to 2012 (61%). The proportion reporting a net loss in 2013 was 13%, only marginally different from 2012 (12%).

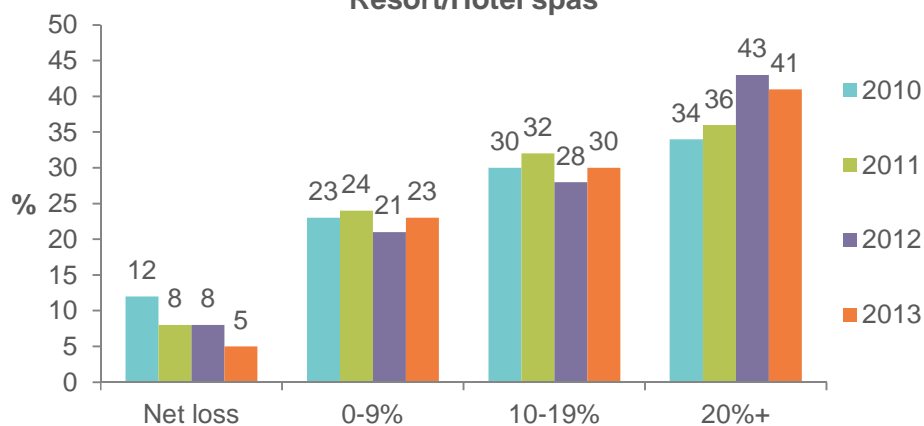
Since many resort/hotel spas are part of a larger enterprise, survey respondents in the resort/hotel sector were asked to give their approximate spa profit percentage, for the spa operation only and not the entire business. All other types of spa establishments were asked to give the approximate spa profit before fixed charges percentage.

In the resort/hotel sector, 41% of spas reported a spa profit percentage in excess of 20% for 2012, slightly down on the 2012 level (43%).

**Profit percentage before fixed charges: 2009-2013**  
**All spas excluding resort/hotel spas**



**Spa profit percentage: 2010-2012**  
**Resort/Hotel spas**





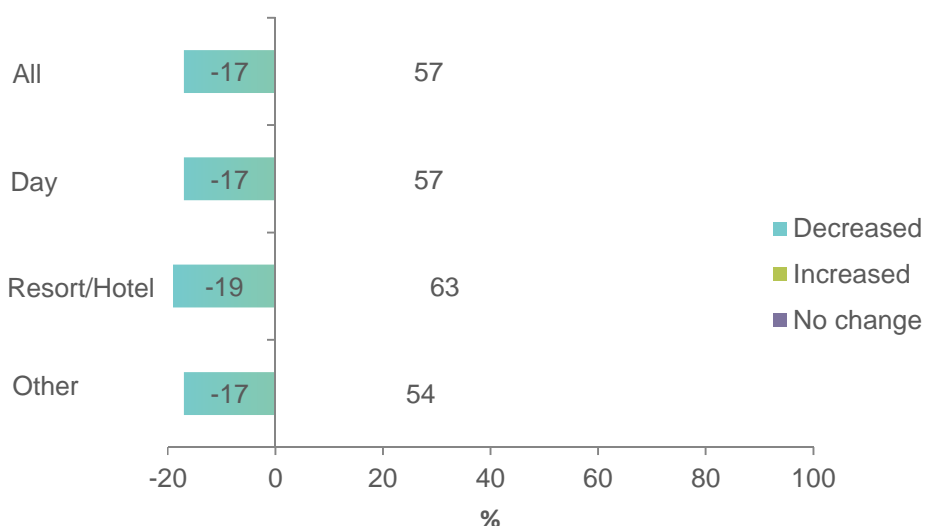
## Profitability: Recent Trends

When asked about their more recent experience in the six months prior to the survey (September 2013 to March 2014), 57% of spas said that profitability had improved compared to the same period one year previously. Fewer than one in five (17%) said that profitability had decreased.

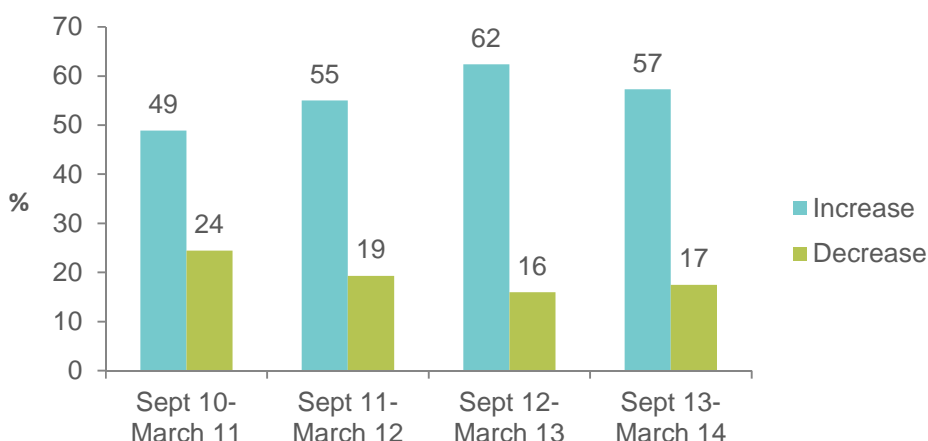
The proportion reporting an increased in profitability did not vary greatly by type of spa, ranging from 57% of day spas to 63% of resort/hotel spas.

The balance between spas reporting an increase in profitability and those reporting a decrease in the six months leading up to March 2014 showed little change compared to the same period one year previously.

**Profitability by spa type**  
Experienced in past six months (Sept 2013 to March 2014)



**Profitability Trend**





## Looking Ahead: Confidence

**Spas remain confident that revenues will increase in the next six months. Over four in five spas (81%) said they were 'confident' or 'very confident' of an increase in revenues in the next six months.**

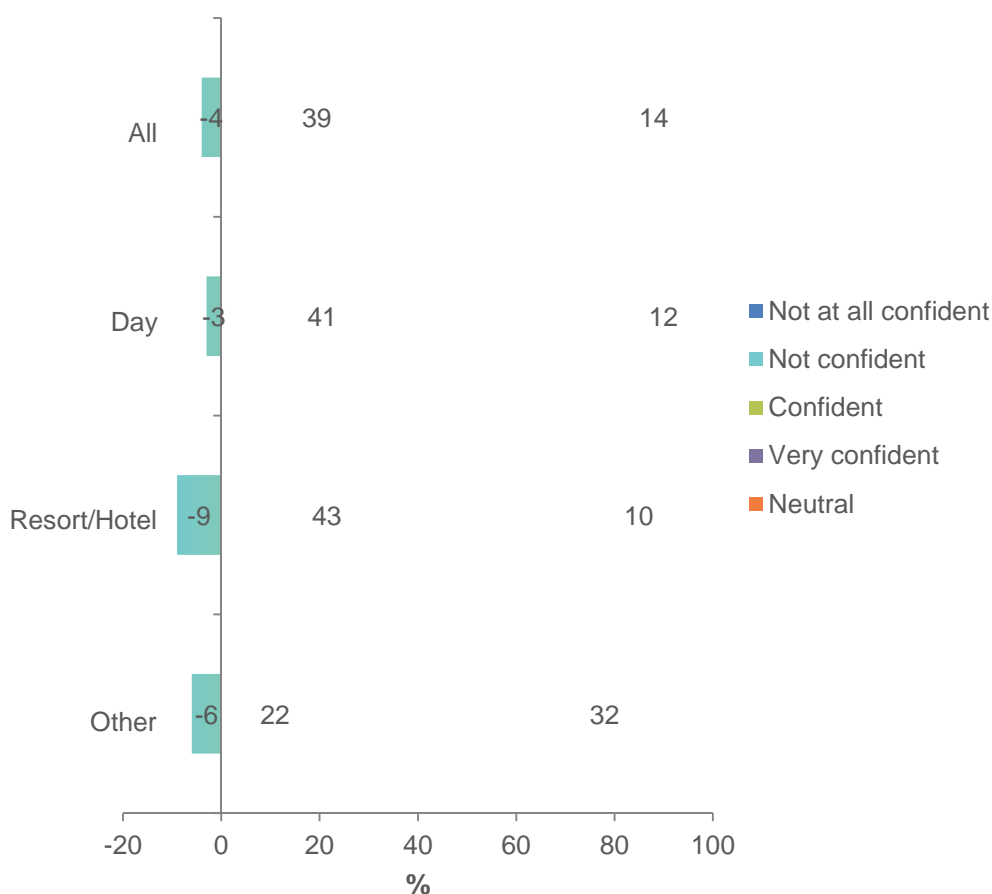
The proportion of spas expressing confidence in their revenue prospects for 2014 was slightly ahead of 2013, when 78% of spas said they were 'confident' or 'very confident'.

Among day spas, 84% said they were 'confident' or 'very confident' of an increase in revenues, compared to 77% in 2013.

Resort/hotel spas were similarly confident looking ahead to the next six months, with 80% indicating they were 'confident' or 'very confident'.

The combined other spa sub-sector was less confident, with 62% expressing a degree of confidence that revenues will increase. Within that category, almost one in three (32%) indicated a neutral position with regard to their revenue prospects for the next six months.

**Confidence in increase of revenues in the next 6 months**





## Looking Ahead: Key Challenges Facing the Spa Industry

The following is a summary of responses made by spa businesses when asked what they think is the biggest issue facing the industry in 2014.

### 1. Discounting/competitive pricing and competition in the marketplace

Almost one in five respondents (18%) mentioned the impact of discounting/competitive pricing as the main issue facing the industry. Similarly, 18% cited issues around competition in the marketplace, i.e., growth in the number of other spa providers as well as competition from providers of related services. These two issues were often linked by respondents, with almost one in three (32%) mentioning one or both as the biggest challenge they face in 2014.

### 2. Staff skills

Issues around staff qualifications and skills were mentioned by 16% of respondents, up from 9% in 2013.

### 3. Staffing

Recruitment and retention of staff was seen as the most challenging issue by 15% of respondents. Respondents frequently mentioned both staff skills and recruitment difficulties, with almost one in four (24%) citing one or both of those factors as the key challenge facing spas in 2014.

The emergence of such staff-related issues can be taken as an indicator of a tightening labor market, as companies seek to employ workers in response to rising demand from consumers.

### 4. The economy

Concerns regarding the state of the U.S. economy would seem to be abating; that issue was cited by 13% of respondents in the 2014 survey, down from 27% in 2013.

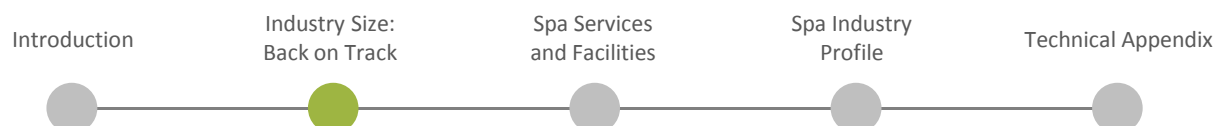
### 5. Consumer perceptions

As in previous years, respondents also stressed the need to tackle consumer perceptions of spas as a luxury/pampering item; mentioned by 12% compared to 10% in 2013.

### 6. Labor and operating costs

These were cited as the main issue by 6% of spas, unchanged from 2013.

Other issues mentioned by spas included standards and regulation (3%) and healthcare/the Affordable Care Act (3%).







## Key Points Summary

### The economic context

The improving national economy has provided a positive context for the spa industry. Though the pace of growth in the U.S. has been modest (2.2% in 2013), employment has continued to rise (+1.7% in 2013) and unemployment has remained on a downward trajectory (an average of 7.4% in 2013 compared to 8.1% in 2012).

### The industry in 2013: Returning to growth

In 2013, total spa industry revenue is estimated to have reached \$14.7 billion, representing a 5.1% increase on the 2012 out-turn. In cash terms, total revenues are now 20% in excess of the position in 2009 (\$12.3 billion) and 11% higher after taking into account price inflation over that period. The spa industry has rebounded nicely from the Great Recession and the latest revenue estimates provide the strongest indication yet that it is now firmly back on a growth trajectory.

The spa industry out-performed the wider U.S. economy in 2013. For example, the 5.1% increase in spa industry revenues was ahead of the overall 2013 growth in personal consumption on services (4% in cash terms).

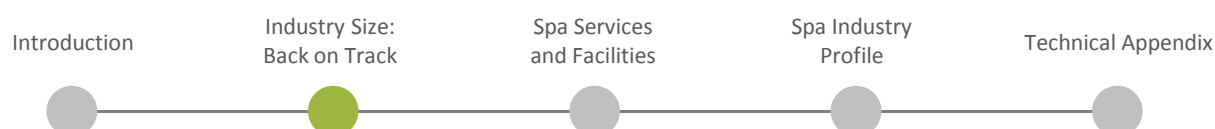
The 5.1% revenue growth recorded in 2013 was due in approximately equal measure to increasing numbers of spa visits (+2.5%) and a rise in the average revenue per visit, up by 2.5% from \$87 to \$89 in 2013.

The total number of visits to spa establishments is estimated to have risen from 160 million in 2012 to 164 million in 2013, the highest level recorded since ISPA commenced tracking the spa industry. The number of visits in 1999 was estimated at 69 million.

The total number of jobs in the spa industry is estimated to have increased from 343,600 in May 2013 to 349,900 in May 2014 (+1.8%). The total number in employment in the sector now stands at its highest level since the inaugural industry study.

As in 2013, the rising employment level was due to expansion of the part-time workforce, up by 8% compared to an estimated fall of 2% among full-time workers. As a result, in 2013 the part-time level exceeded the full-time level for the first time since employment levels were first estimated by the industry study. It should, however, be noted that the part-time share of the spa workforce has been rising consistently over that period, from a baseline of 30% in 2000.

In 2013, the number of spa locations remained on a rising trend, increasing by 1.1% and climbing back above the 20,000 mark which had first been reached in 2008.





## Key Points Summary

### Profitability

Excluding the resort/hotel sector, 57% of spas reported a 2013 profit percentage in excess of 10%, a slight decrease compared with 2012 (61%). At 13%, the proportion reporting a net loss remained stable compared to 2012 (12%).

Within the resort/hotel sector, the proportion reporting a spa profit percentage in excess of 10% was also stable, holding constant at 71%. The proportion saying they experienced a net loss dipped to 5%, down from 8% in 2012.

### Recent trends: Gearing for growth

When asked about their more recent experience in the six months prior to the survey (September 2013 to March 2014), a majority of spas reported an increase in revenue (67%), visits (63%) and client spending per visit (59%). Each of those demand indicators showed little change from 2013, suggesting that prospects for 2014 remain in positive territory.

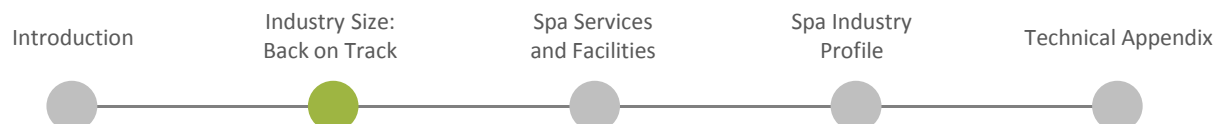
The employment outlook is encouraging. Spas were twice as likely to report an increase in staffing levels (40%) compared to the proportion saying that staffing levels had been decreasing (19%).

### Looking ahead

Spas remain confident that revenues will increase in the next six months. Over four in five spas (81%) said they were 'confident' or 'very confident' of an increase in revenues in the next six months.

Respondents were also asked to say what they think is the single biggest issue facing the spa industry in 2014. Most frequently, spas mentioned the impact of discounting (18%) and competition in the marketplace (18%). Staff-related issues also featured prominently, with 16% of respondents highlighting difficulties in finding skilled staff and a similar proportion (15%) pointing to problems with recruitment and retention of employees.

The emergence of such staff-related issues can be taken as an indicator of a tightening labor market, as companies seek to employ workers in response to rising demand from consumers. In that regard, it is interesting to note that concerns regarding the state of the U.S. economy would seem to be abating; that issue was cited by 13% of respondents in the 2014 survey, down from 27% in 2013. As in previous years, respondents also stressed the need to tackle consumer perceptions of spas as a luxury/pampering item; mentioned by 12% compared to 10% in the 2013 survey.





## Section 3 | Spa Services and Facilities



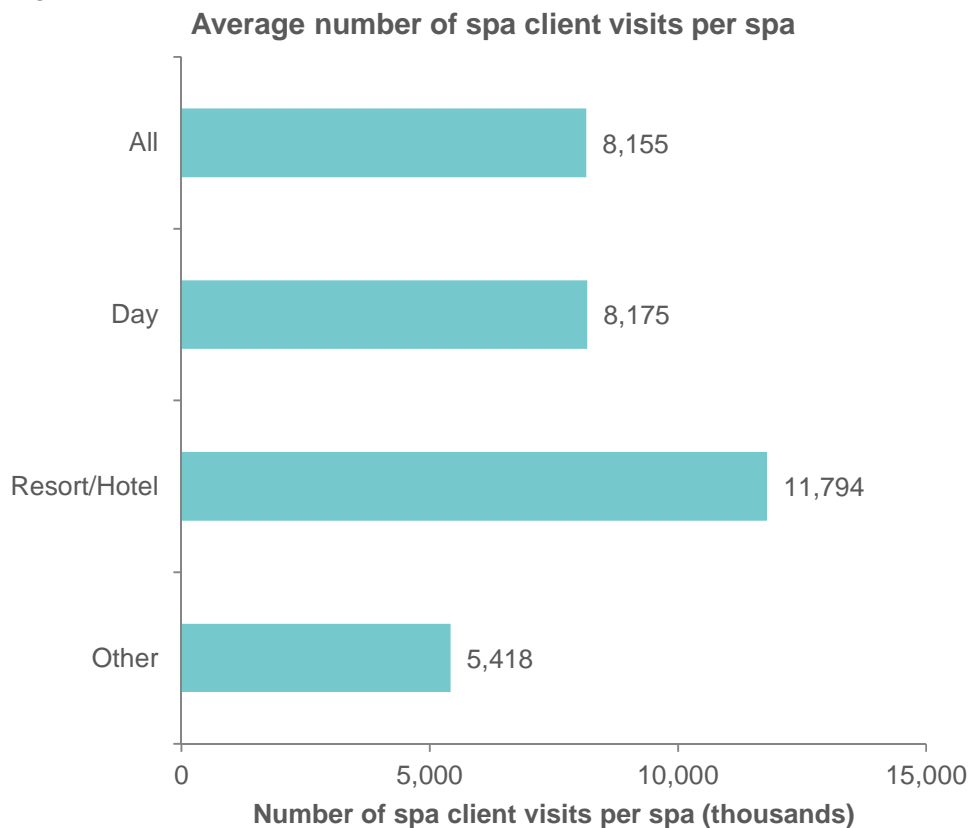


## Section 3: Introduction

**In 2013, spas received an estimated 164 million client visits. This Section describes the facilities and services that spas offered to their clients.**

This Section addresses the following topics:

- The total square footage of spa facilities and the average by type of spa.
- The elements included in the facilities that spas operate.
- The core types of services offered by spas and average prices per service.
- The retail element in spa facilities – range of product types and average value of purchases per guest.
- Spa treatment offerings.
- Packages targeted at demographic and other groups.
- Spa treatment bookings made online.
- Revenue from gift card promotions.
- Plans for 2014.





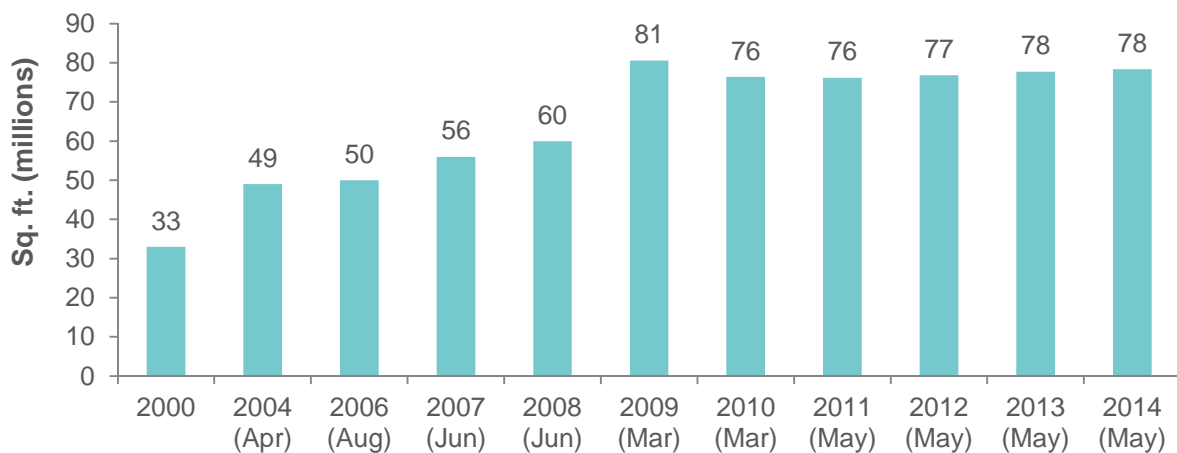
## Total Square Footage

**As of May 2014, total indoor floor space stood at an estimated 78.4 million square feet, an increase of 1.1% compared to May 2013.**

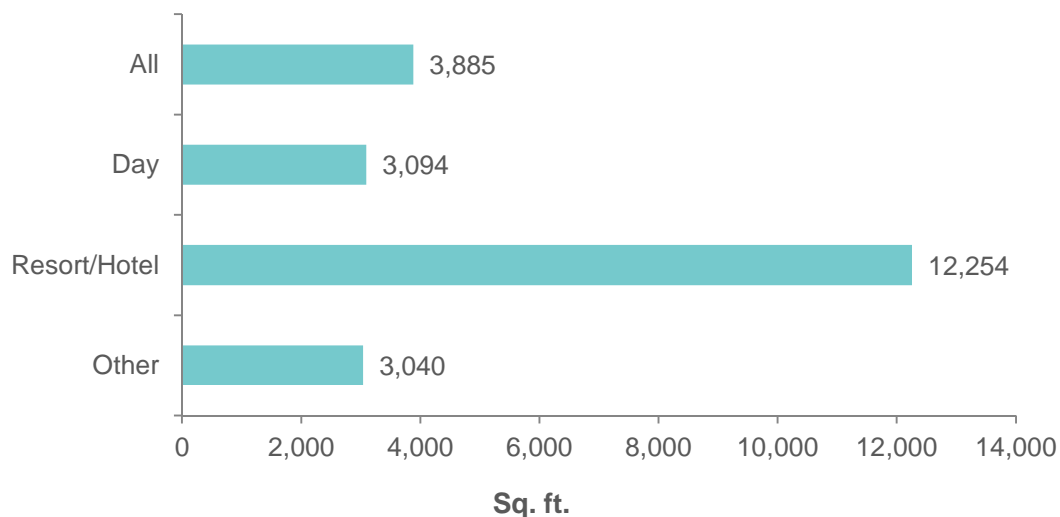
The average square footage per establishment as of May 2014 (3,900) was unchanged from May 2013.

Average square footage varied by spa type, from 12,254 in resort/hotel spas to 3,094 in day spas.

**Total square footage in the U.S. (millions)**



**Average square footage per establishment**





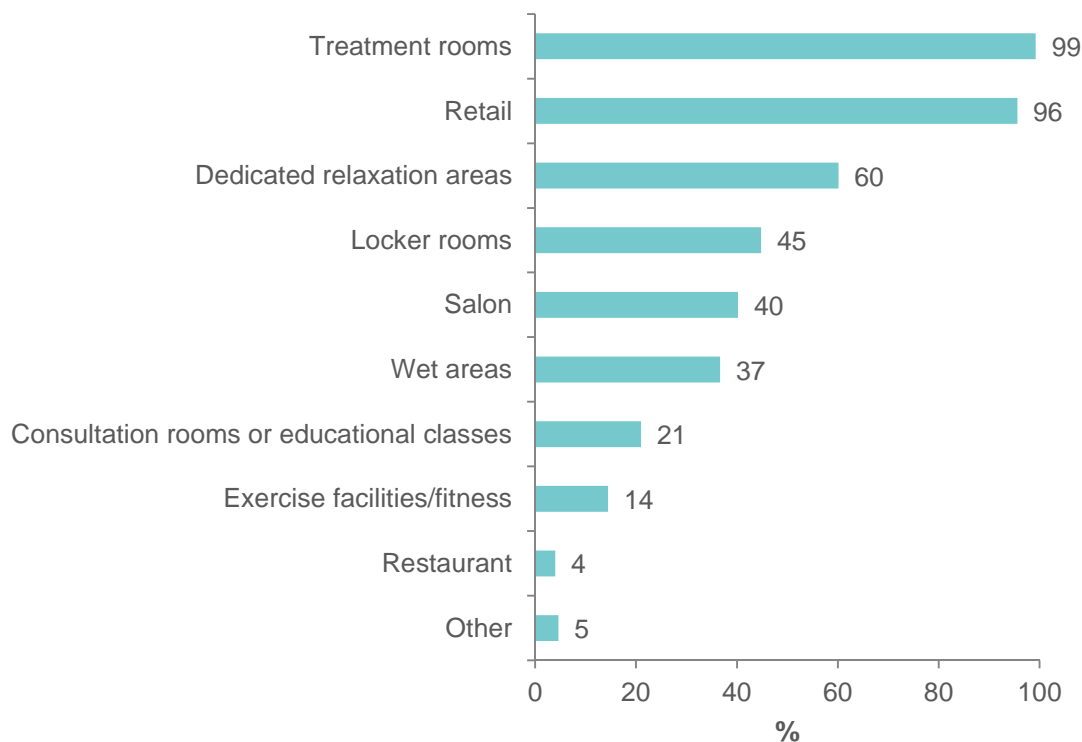
## Indoor Square Footage: Elements

**Almost all spas contain one or more treatment rooms and also a retail element. The remaining elements of indoor square footage vary according to the type of spa.**

Reflecting their larger size, resort/hotel spas typically contain a wider range of elements than other spa types; an average of 6.1 compared to the average for day spas of four elements. Points of contrast between resort/hotel spas and day spas include:

- Almost four in five resort/hotel spas (77%) contain wet areas compared to one in three day spas (33%).
- The salon element is found in 67% of resort/hotel spas compared to 40% of day spas.
- Resort/hotel spas are more likely to contain areas devoted to exercise facilities/fitness; 65% compared to 7% of day spas.

**Elements of indoor square footage**





## Indoor Square Footage: Elements by Spa Type

	All	Day	Resort/Hotel	Other
Treatment rooms	99%	99%	99%	100%
Retail	96%	96%	98%	88%
Dedicated relaxation areas	60%	60%	89%	43%
Locker rooms	45%	41%	90%	38%
Salon	40%	40%	67%	24%
Wet areas	37%	33%	77%	32%
Consultation rooms or educational classes	21%	18%	16%	46%
Exercise facilities/fitness	14%	7%	65%	25%
Restaurant	4%	3%	9%	9%
Other	5%	4%	2%	11%
Average number of elements	4.2	4.0	6.1	4.2

Introduction

Industry Size:  
Back on TrackSpa Services  
and FacilitiesSpa Industry  
Profile

Technical Appendix





## Types of Services Offered

**The main services provided by spas are skin care services (91%) and massage services (91%), followed by body services (79%) and salon services (63%).**

The range and mix of services offered varies by type of spa. For example, almost all resort/hotel spas offer body services (98%) compared to 78% of day spas and 68% of the combined other spa category. Hydrotherapy services are offered by one in four spas, ranging from 50% of resort/hotel spas to 24% of day spas and 10% in the other spa category.

As resort/hotel spas tend to be larger in size, typically they also offer a wider range of services; an average of 5.7 types of services compared to 4.2 among day spas.

In addition to their core spa and salon services, many spas offer their visitors a diverse range of treatments and programs.

Over one in three spas (35%) said they offer complementary or alternative therapies, such as reiki, energy work and acupuncture.

Mind, body and spirit programs are available at 17% of spas. These programs typically include yoga as well as meditation and relaxation classes. Such programs are found in 45% of resort/hotel spas.

Healthy living programs (i.e., smoking cessation, weight loss, etc.) are offered at 13% of spas, most frequently in the combined other spa category (39%), which includes medical spas, club spas and destination spas.

**Types of services offered**







## Product Offering: Core Spa Services

	All	Day	Resort/Hotel	Other
Massage services	91%	90%	100%	86%
Skin care services	91%	92%	100%	79%
Body services	79%	78%	98%	68%
Salon services	63%	64%	86%	40%
Complementary or alternative therapies	35%	36%	22%	41%
Hydrotherapy services	25%	24%	50%	10%
Medically supervised services	18%	13%	5%	55%
Mind, body & spirit programs	17%	11%	45%	35%
Healthy living programs (i.e., smoking cessation, weight loss, etc.)	13%	9%	9%	39%
Fitness or sports services	11%	4%	58%	24%
Average number of services	4.4	4.2	5.7	4.8

Introduction

Industry Size:  
Back on TrackSpa Services  
and FacilitiesSpa Industry  
Profile

Technical Appendix





## Prices Per Service

**The average price per spa service is estimated to have increased from \$82 in 2012 to \$88 in 2013 (+7%).**

Average prices are estimated to have increased across all types of spa services, including 5% per massage and body services and 7% per facial.

In considering the reported uplift in 2013, it is useful to reflect that over the period from 2009 to 2012 the change in average prices per spa service (+1%) had lagged behind the 7% rise in the overall Consumer Price Index (CPI). In that context, the estimated 7% increase in the average price per spa service in 2013 can be seen as catching up by the sector on the rise in the overall price level for consumer goods and services.

It should, however, be noted that the extent to which increasing prices are converted into total revenue growth will depend on a range of factors, including the mix of services chosen by the client and the use of discounting by the business.

### Average prices, 2013 compared to 2012, 2011, 2010 and 2009

	2009	2010	2011	2012	2013
Per massage	\$86	\$85	\$85	\$87	\$91
Per facial	\$91	\$90	\$88	\$94	\$100
Per body treatment	\$96	\$95	\$96	\$97	\$102
Per hair service	\$67	\$68	\$70	\$66	\$73
Per nail service	\$41	\$41	\$42	\$42	\$43
Per service	\$81	\$80	\$80	\$82	\$88





## Prices Per Service by Type of Spa

**Regardless of the type of service, the average price per spa service tends to be higher in resort/hotel spas than in day spas.**

For example, the average price per massage in a resort/hotel spa was quoted at \$136, about 57% higher than the average quoted by day spa respondents (\$87). Similar price differences can be seen for facials, \$140 in resort/hotel spas compared to \$95 in day spas, and body treatments, \$142 compared to \$97.

Nonetheless, price comparisons by type of spa should be made with a degree of caution. The averages shown in the accompanying chart may vary across individual spas according to a range of factors such as location.

**Average price per service by type of spa**





## Retail: Product Types

**Almost all spas (96%) contain a retail element. Within those spas, skin care products are most frequently offered (95%) followed by cosmetics (53%) and nail care products (56%).**

Resort/hotel spas tend to offer a wider range of retail products when compared with the industry average. When asked about the types of products that they sell as part of their retail operation, the typical resort/hotel spa mentioned five of the six categories listed in the accompanying table.

Among day spas, the average number of product types sold was 3.4. Compared to resort/hotel spas, day spas are almost as likely to offer skin care products (95% compared to 100%) but less likely to offer other retail products such as hair care (42% compared to 81% of resort/hotel spas) and nail care products (55% of day spas compared to 89% of resort/hotel spas).

The average dollar value of retail purchases was \$35 in 2013, unchanged from the 2012 average. The average reported by day spas (\$32) was not much different from the resort/hotel average (\$34).

	All	Day	Resort/ Hotel	Other
Apparel	32%	28%	70%	30%
Skin care products	95%	95%	100%	95%
Hair care products	44%	42%	81%	29%
Cosmetics	53%	48%	79%	70%
Nail care products	56%	55%	89%	36%
Other	70%	70%	78%	66%

Average dollar value of retail purchases per guest				
Average	\$35	\$32	\$34	\$58
Median	\$20	\$20	\$20	\$49

*Base: Spas with a retail element (96% of all spas)*





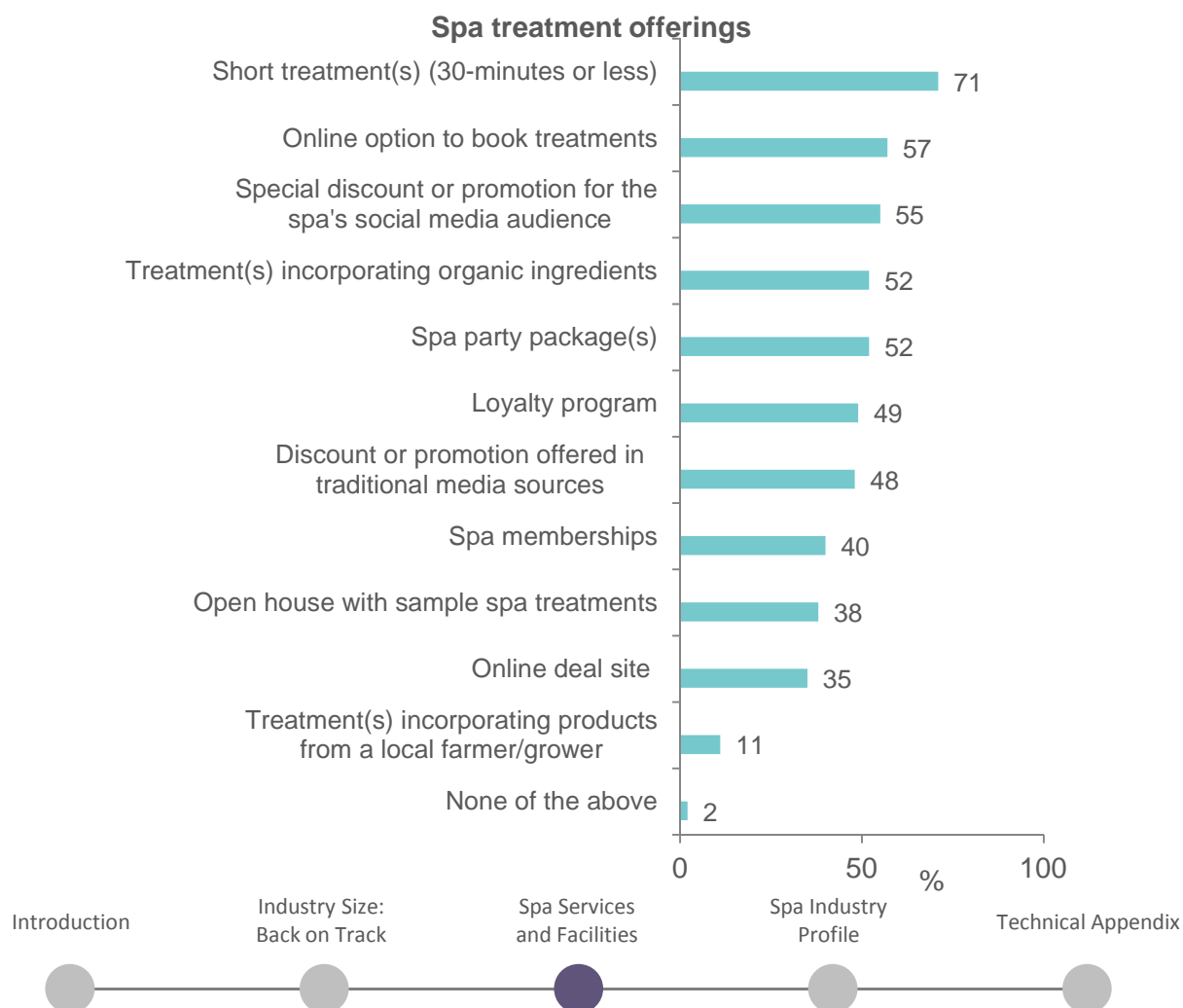
## Spa Treatment Offerings

As in previous years, spas have been taking positive steps to attract consumers, including expanded treatment offerings (i.e., 71% offer 30-minute treatments, up from 61% in 2013) as well as discounts and promotions (i.e., 55% offer these to the spa's social media audience, up from 51% in 2013). An increasing proportion of spas are also offering consumers the option to book online; 57% in 2014 up from 45% in 2013.

The menu of spa treatment offerings shown in the accompanying chart was broadly similar across day spas and resort/hotel spas. For example, short treatments were the most frequently reported offering both in resort/hotel spas (74%) and in day spas (71%).

Points of contrast include the following:

- Day spas were more likely to offer a loyalty program; 49% compared to 34% of resort/hotel spas. The option of booking treatments online was offered by 61% of day spas compared to 43% of resort/hotel spas. Day spas were also more likely to offer discounts or promotions in traditional media sources (49% compared to 38%).
- Treatments incorporating organic ingredients were more likely to be offered by resort/hotel spas (69%) than by day spas (53%). Resort/hotel spas were also more likely to say they incorporated products from a local grower (24% compared to 11% of day spas).





## Spa Treatment Offerings

	All	Day	Resort/Hotel	Other
Short treatment(s) (30-minutes or less)	71%	71%	74%	72%
Online option to book treatments	57%	61%	43%	42%
Special discount or promotion for the spa's social media audience	55%	54%	53%	59%
Treatment(s) incorporating organic ingredients	52%	53%	69%	35%
Spa party package(s)	52%	53%	52%	45%
Loyalty program	49%	49%	34%	61%
Discount or promotion offered in traditional media sources, (i.e., newspaper, magazine, direct mail, TV, radio)	48%	49%	38%	45%
Spa memberships	40%	41%	41%	36%
Open house with sample spa treatments	38%	35%	46%	55%
Online deal site promotion	35%	35%	30%	41%
Treatment(s) incorporating products from a local farmer/grower	11%	11%	24%	6%
None of the above	2%	2%	1%	8%



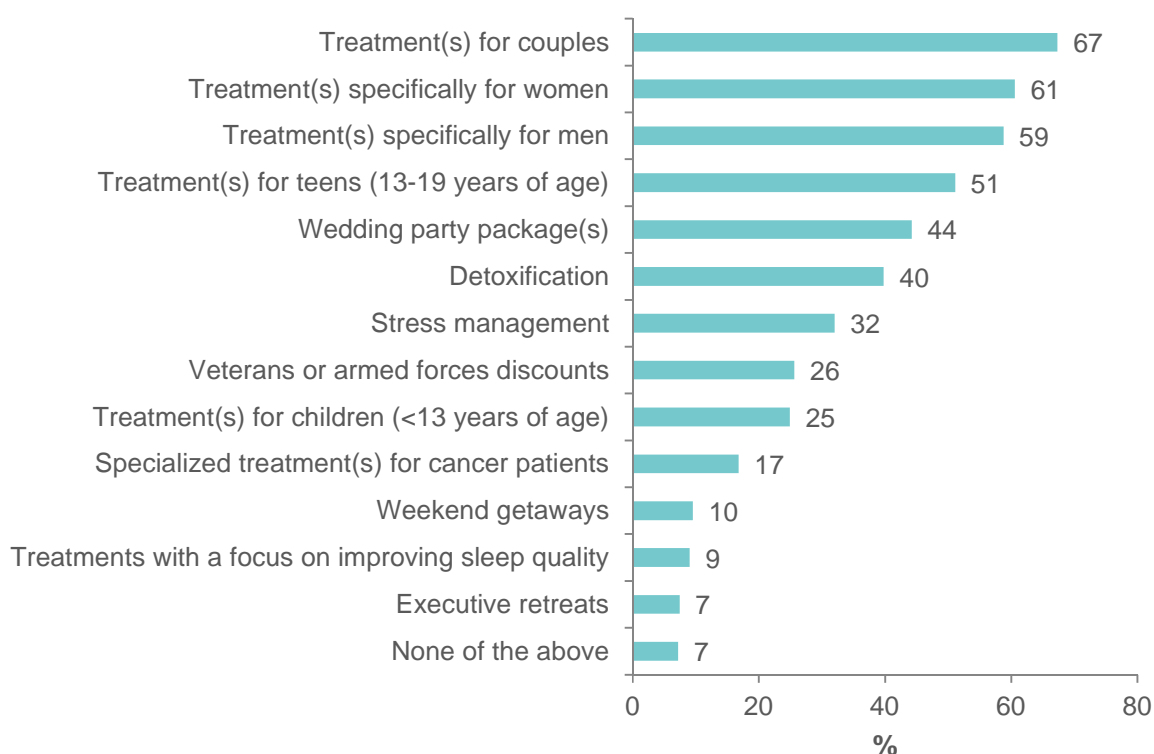
## Packages Targeted at Demographic and Other Groups

Spas have been actively promoting their services by offering packages aimed at different demographic and other groups (i.e., 67% of spas offer packages for couples, up from 64% in 2013).

Packages targeted at couples were most frequently mentioned by both day spas and resort/hotel spas, but more often by the latter (89% versus 68%).

Resort/hotel spas are also more likely to feature treatments specifically for men (77% compared to 58% of day spas), wedding party packages (72% versus 43%) and weekend getaways (36% versus 7%).

### Special packages





## Packages Targeted at Demographic and Other Groups

	All	Day	Resort/Hotel	Other
Treatment(s) for couples	67%	68%	89%	46%
Treatment(s) specifically for women	61%	60%	68%	57%
Treatment(s) specifically for men	59%	58%	77%	54%
Treatment(s) for teens (13-19 years of age)	51%	51%	49%	56%
Wedding party package(s)	44%	43%	72%	34%
Detoxification	40%	39%	41%	42%
Stress management	32%	32%	23%	36%
Veterans or armed forces discounts	26%	26%	28%	24%
Treatment(s) for children (<13 years of age)	25%	23%	25%	34%
Specialized treatment(s) for cancer patients	17%	18%	8%	18%
Weekend getaways	10%	7%	36%	6%
Treatments with a focus on improving sleep quality	9%	9%	9%	11%
Executive retreats	7%	7%	17%	2%
None of the above	7%	8%	2%	6%





## Company Websites and Online Bookings

Spas are taking advantage of the opportunities offered by internet availability and access. Almost all spas (96%) now have a website to promote their services. Among spas offering the online booking option, the average percentage of bookings made online is 20%.

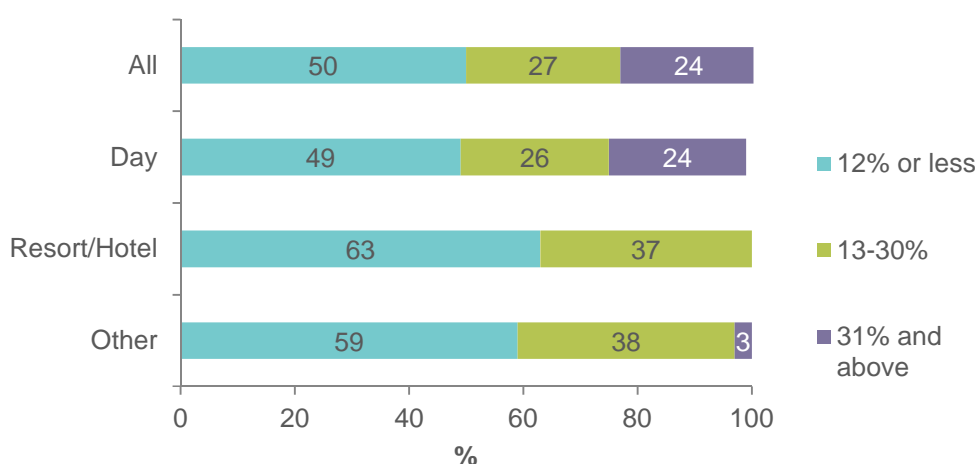
The proportion of bookings made online varies from 22% of day spas to 10% of resort/hotel spas.

Among day spas with an online option, almost one in four (24%) said that 31% or more of their spa treatment bookings are made online. A similar proportion (26%) said that 13-30% of their treatment bookings are made online. The remaining 49% said that the online option accounts for 12% or less of their treatment bookings.

By contrast, among resort/hotel spas with an online option, 63% said that online bookings account for 12% or fewer of their treatment bookings with the remaining 37% attributing 13%-30% of their treatment bookings to the online option.

	All	Day	Resort/ Hotel	Other
<b>Company website</b>				
% of spas	96	97	94	91
<b>Online booking option</b>				
% of spas	57	61	43	42
<b>Percent of spa bookings made online (Base=spas with online option)</b>				
Average	20	22	10	12

### Spas with online option – treatments booked online (%)





## Gift Card Revenue

A large majority of spas (78%) said that some portion of their revenue comes from gift card promotions. Among those spas offering gift cards, the revenue generated by gift card sales amounted to 14% of their total revenues. Considering all spas, including those that offer gift cards and those that do not, an estimated 11% of total spa sector revenues are derived from gift card sales.

The use of gift cards is higher among day spas (84%) compared to resort/hotel (62%) and the combined other spa category (58%).

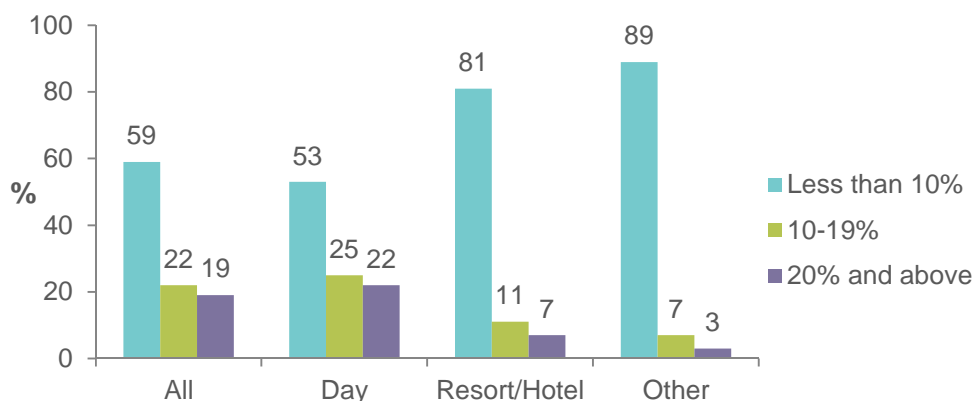
Fifty-nine percent of spas offering gift cards said the revenue generated by gift card sales amounted to less than 10% of their total revenues.

Among day spas that said they accept gift cards, 53% said their gift card revenue amounted to less than 10% of their total sales. One in four said that gift cards contributed 10-19% of total revenue with the remaining 22% indicating that such cards generated 20% or more of their revenue.

Revenue generated in 2013 from sales of gift cards or gift card promotions

	All	Day	Resort/ Hotel	Other
	%	%	%	%
<b>Offering gift card</b>				
No	22	16	38	42
Yes	78	84	62	58
<b>Average revenue share</b>				
All spas	11	14	5	6
Spas offering 1+ gift card promotions	14	16	7	8

Revenue shares: Spas with gift card sales





## Plans for 2014

**Spas are also positioning themselves for further growth. When asked about their plans for 2014, almost all spas (97%) pointed to steps they intend taking to help boost their prospects for 2014.**

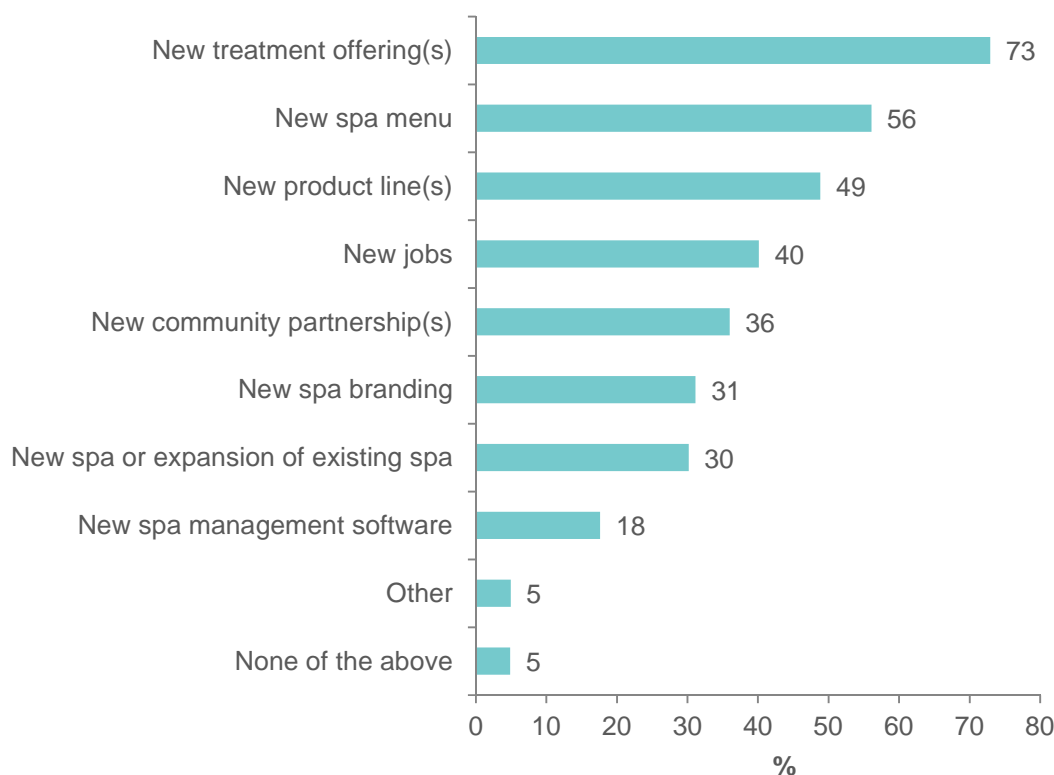
Almost three in four spa businesses (73%) said they would be adding new treatment offerings, followed by 56% saying they intended creating a new spa menu, while new product lines were cited by 49%.

On the employment side, 40% of businesses said they would be creating new jobs in 2014.

A new spa or expansion of an existing spa was on the agenda for 30% of the businesses surveyed.

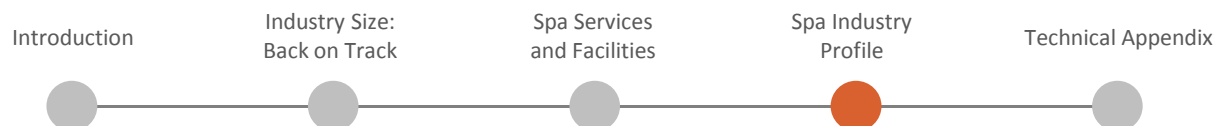
Almost one in two spas (49%) said they intended adding new product lines. The proportion was higher among resort/hotel spas (69%).

### Planning to add or create in 2014





## Section 4 | Spa Industry Profile



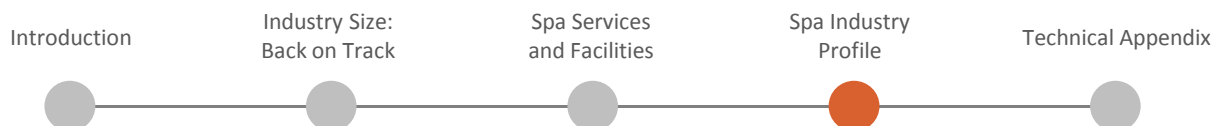


## Section 4: Introduction

**This Section presents a profile of the estimated 20,180 spa industry establishments located across the U.S. The spa industry is diverse, with establishments varying by size, facilities, range of services offered, as well as the people who work in spas and the clients they serve.**

This Section focuses on the following spa establishment categories:

- What is the composition of the industry by type of spa?
- What are the main contrasts by type of spa establishment in respect to industry size statistics, i.e., average revenues, visits, floor space and employment?
- Where are spas located?
- What is the age profile of spa establishments, as measured by year of start-up?
- How many spas are single location operations or affiliated to a larger entity?





## Key Ratios

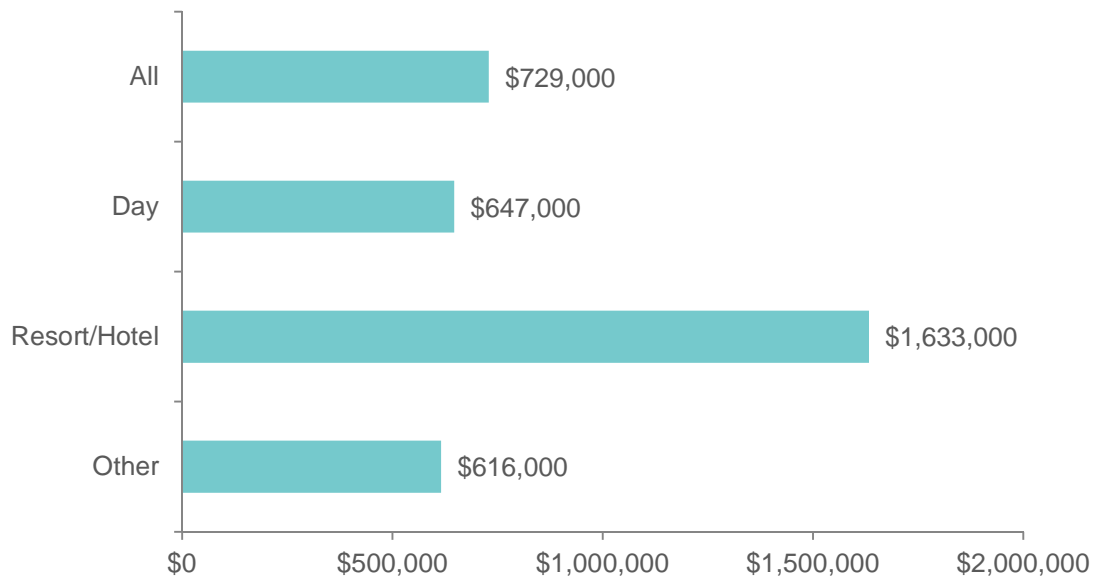
**Key size indicators vary by type of spa. As in previous years, average revenues and visits per resort/hotel spa are higher than for day spas.**

The key size indicators are shown for the main spa types in the Key Ratios table on page 46. For comparability with previous studies, floor space ratios are also shown.

Also shown are revenue ratios, including revenues per visit, per square foot of floor space and per employed person. Resort/hotel spas generate higher average revenues per visit (\$138) compared to day spas (\$79).

By contrast, and reflecting their more intensive use of floor space, revenue per square foot of floor space tends to be higher in day spas (\$210) than in resort/hotel spas (\$130).

**Average revenue by type of spa**



*Note: The key ratios by spa type should be interpreted with caution. They are estimates based on a sample of spa establishments and will therefore be subject to variability from sampling error. Special care should be taken in making comparisons with previous Spa Industry Studies as the estimates in those previous reports will also exhibit variability due to sampling error.*



## Key Ratios by Spa Type

	All	Day	Resort /Hotel	Other
<b>Revenue per spa</b>	<b>\$729,000</b>	<b>\$647,000</b>	<b>\$1,633,000</b>	<b>\$616,000</b>
Per visit	\$89	\$79	\$138	\$114
Per sq ft	\$190	\$210	\$130	\$200
Per employed person	\$42,010	\$41,240	\$46,530	\$39,750
<b>Visits per spa</b>	<b>8,155</b>	<b>8,175</b>	<b>11,794</b>	<b>5,418</b>
<b>Square footage per spa</b>	<b>3,885</b>	<b>3,094</b>	<b>12,254</b>	<b>3,040</b>
<b>Total employees per spa</b>	<b>17.3</b>	<b>15.7</b>	<b>35.1</b>	<b>15.5</b>
Full-Time	7.4	6.7	15.2	6.2
Part-Time	7.8	7.0	17.6	6.1
Contract	2.2	2.0	2.3	3.3

*Note: As they are based on a sample of spas, the key ratios by spa type should be interpreted with caution. Please see note on previous page when making comparisons with previous Spa Industry Studies.*



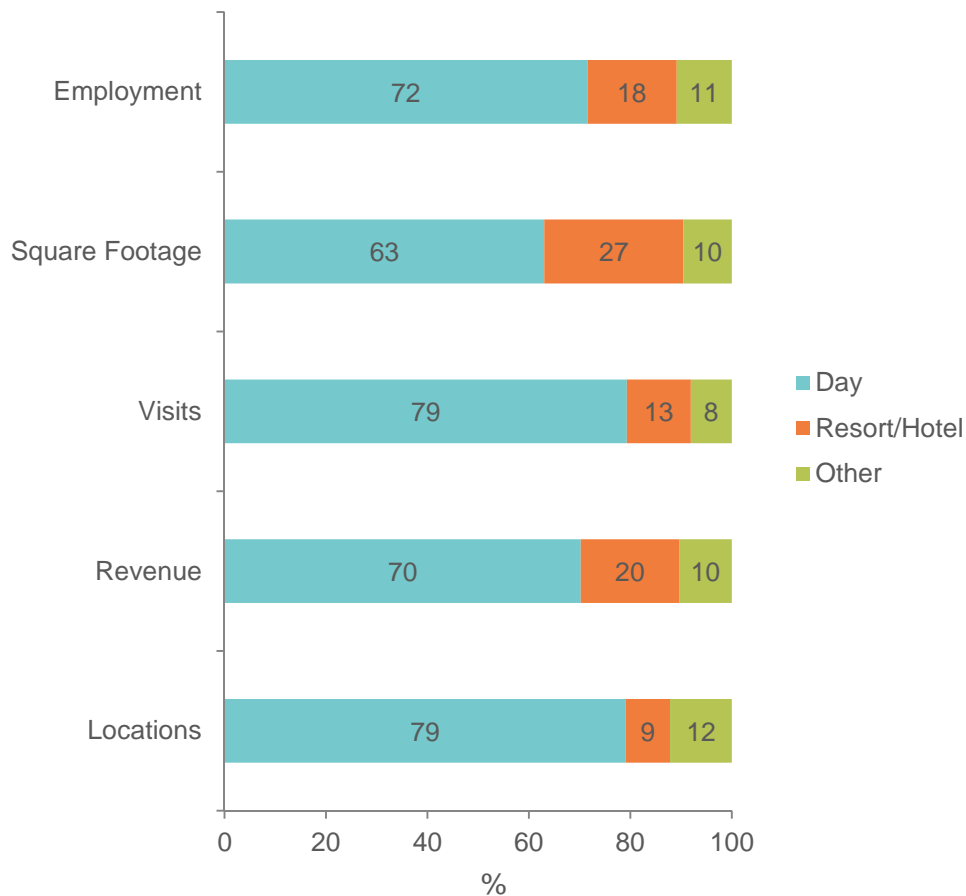
## The Big Five: Composition by Spa Type

The composition of various size indicators by spa type varies according to differences between spas in key ratios such as average revenues and visits.

The average resort/hotel spa generates 2.2 times more revenue compared to the industry average; consequently, the resort/hotel spa share of total industry revenue (20%) is 2.2 times larger than the sector's 9% share of locations.

Day spas account for 79% of total spa industry visits, the same as their 79% share of locations. However, since average revenue per visitor in the day spa sector (\$79) is below the industry average (\$89), the day spa share of total industry revenues (70%) is below its 79% share of visits.

Composition by spa type







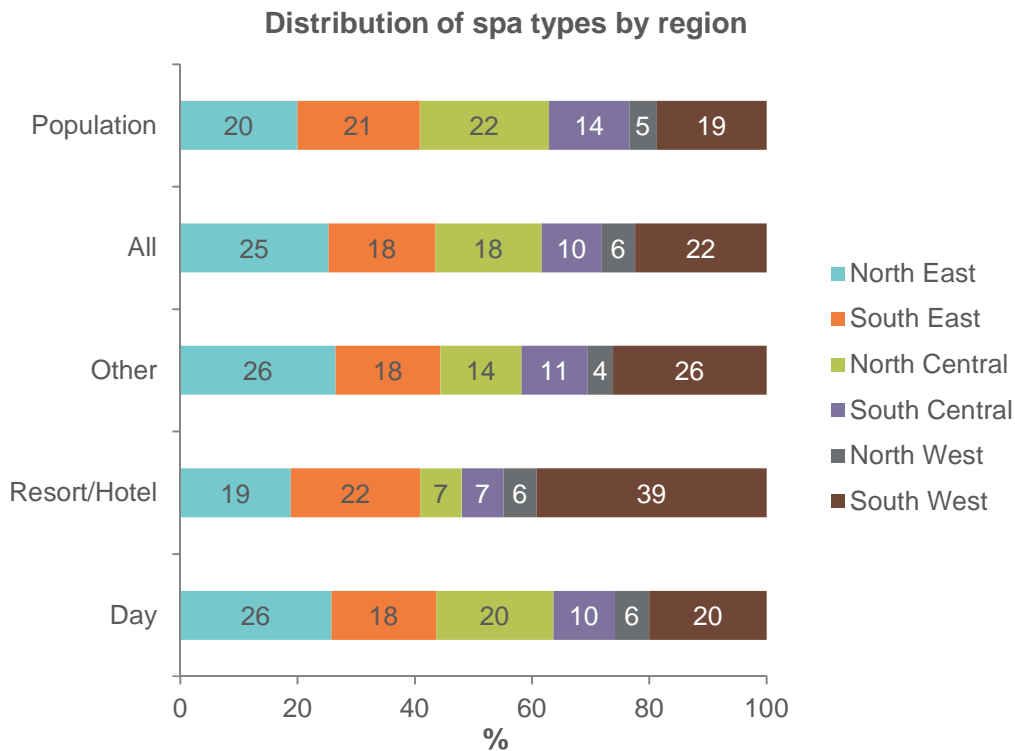
## Geography of the Spa Industry: Distribution of Spa Types by Region

The distribution of spa types by region in 2013 shows little change from the historic pattern.

Compared to the general population, resort/hotel spas are more heavily concentrated in the South West region; 39% of such spas are located in the South West, i.e., over two times the region's 19% population share.

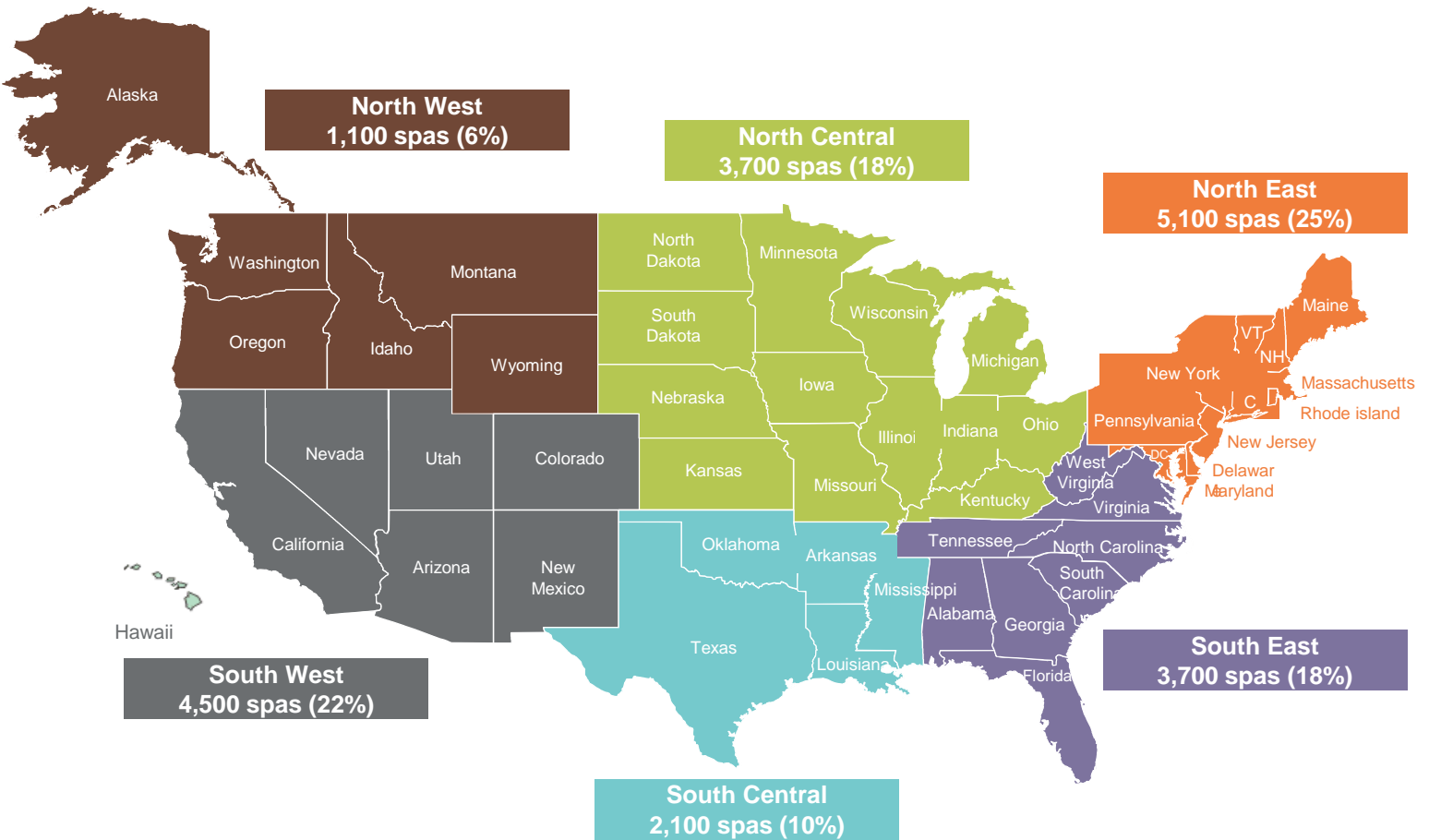
The regional distribution of day spas more closely follows the general population, as such spas typically serve the population living in the areas where they are located.

The map of spa establishments by region is shown on page 49. Key ratios by region are shown in the table on page 50.





## The Distribution of Spa Establishments by Region



Note: Number of spas rounded to the nearest 100

Introduction

Industry Size:  
Back on Track

Spa Services  
and Facilities

Spa Industry  
Profile

Technical Appendix



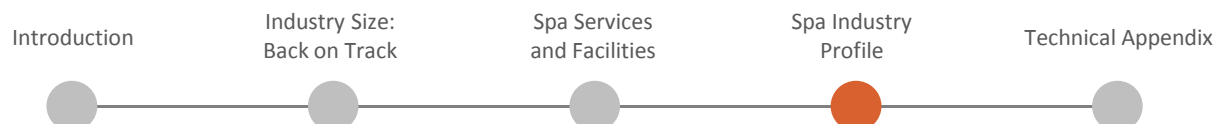


## Key Ratios by Region

	All	North East	South East	North Central	South Central	North West	South West
<b>Revenue per Spa</b>	<b>\$729,000</b>	<b>\$725,000</b>	<b>\$690,000</b>	<b>\$621,000</b>	<b>\$783,000</b>	<b>\$838,000</b>	<b>\$800,000</b>
Per visit	\$89	\$92	\$83	\$82	\$83	\$97	\$99
Per sq ft	\$190	\$190	\$170	\$190	\$220	\$230	\$170
Per employed person	\$42,010	\$45,670	\$37,360	\$38,480	\$41,760	\$50,790	\$42,880
<b>Visits per Spa</b>	<b>8,155</b>	<b>7,871</b>	<b>8,350</b>	<b>7,602</b>	<b>9,453</b>	<b>8,607</b>	<b>8,053</b>
<b>Square Footage</b>	<b>3,885</b>	<b>3,742</b>	<b>4,006</b>	<b>3,222</b>	<b>3,609</b>	<b>3,710</b>	<b>4,654</b>
<b>Total Employees</b>	<b>17.3</b>	<b>15.9</b>	<b>18.5</b>	<b>16.1</b>	<b>18.7</b>	<b>16.5</b>	<b>18.7</b>
Full-Time	7.4	6.2	7.5	6.8	10.2	8.1	7.4
Part-Time	7.8	7.7	7.8	7.8	7.0	6.3	8.6
Contract	2.2	2.0	3.1	1.5	1.5	2.1	2.6
<b>Locations*</b>							
<b>% of total locations</b>	<b>20,200</b>	<b>5,100</b>	<b>3,700</b>	<b>2,100</b>	<b>2,100</b>	<b>1,100</b>	<b>4,500</b>

\*Regional number of locations rounded to the nearest hundred.

Note: The key ratios by region should be interpreted with caution, particularly when comparing with the national average statistics. Similarly, changes compared to previous years will reflect sampling variability. Please see key ratios note on page 46.





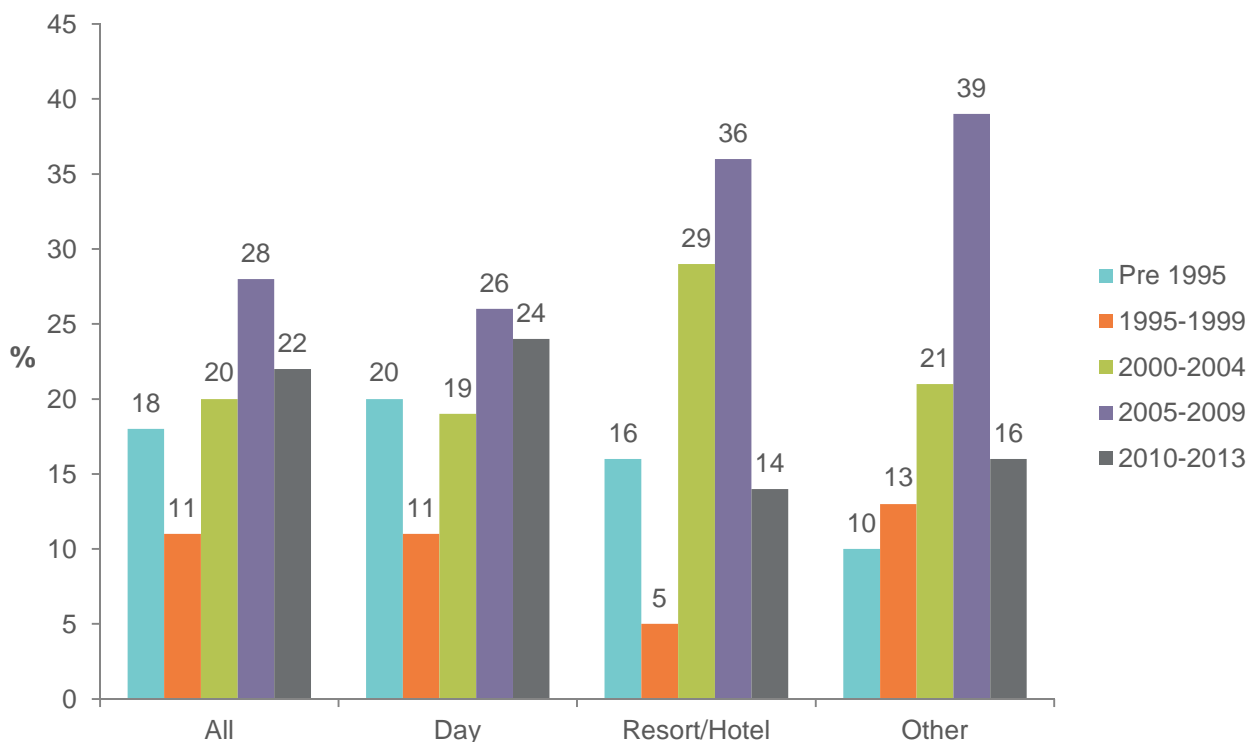
## Year Spa Business Started

Among those spas in business at the end of 2013, 28% said they started in the period from 2005 to 2009. Over one in five (22%) started in the more recent period from 2010 to 2013.

The proportion opening in the period from 2000 to 2004 was highest among resort/hotel spas, with 29% opening in that period compared to 19% of day spas.

By contrast, day spas were more likely to say that their business started before 2000, i.e., 31% of day spas compared to 21% of resort/hotel spas.

Year spa business started





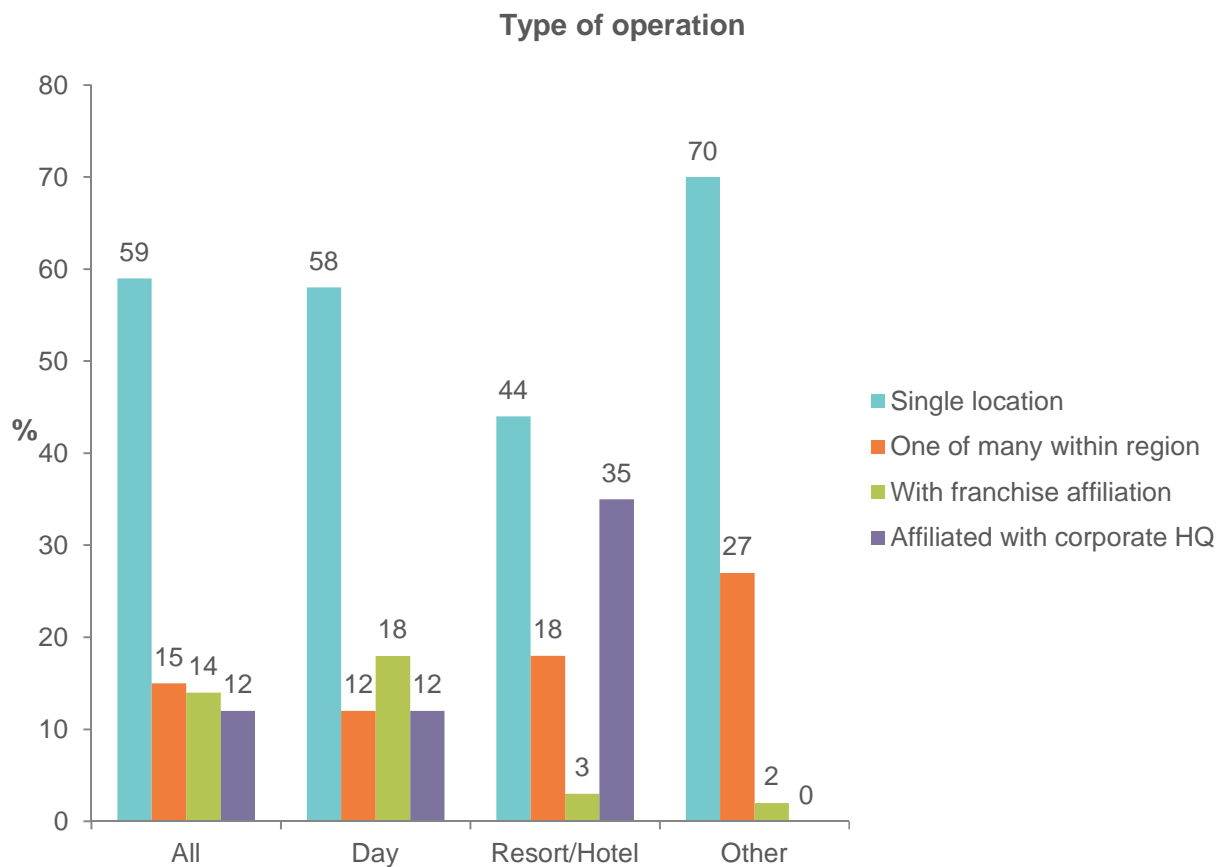
## Type of Operation

**The majority of spas (59%) describe themselves as single location operations.**

Resort/hotel spas are the main exception. More than one in three (35%) are affiliated with a national corporate headquarters, this can be compared with the 12% average of all spas.

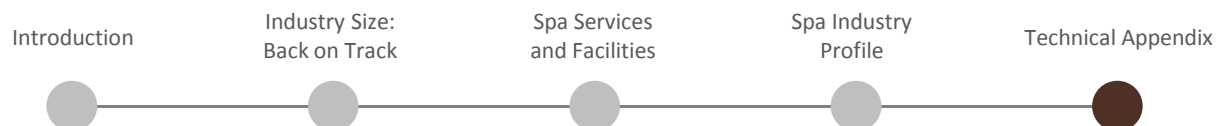
Fifteen percent of spas said they are one of a number of locations within the same state or region and owned by the same owner/company.

Operations with a franchise affiliation account for 14% of spas.





## Section 5 | Technical Appendix

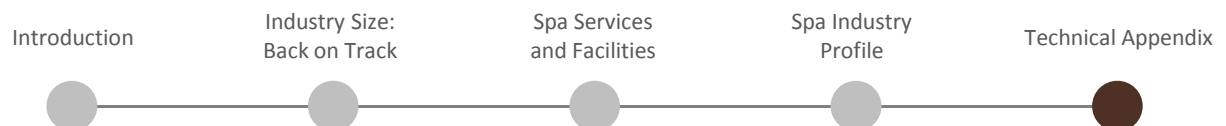




## Section 5: Introduction

This Section describes the approach to the 2014 U.S. Spa Industry Study, under the following headings:

- Overview on the methodology;
- The questionnaire;
- Survey outcomes; and
- Comparability over time.



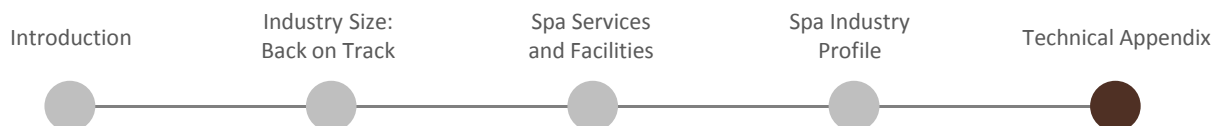


## Survey Methodology

A large scale quantitative survey of spa establishments was undertaken to collect the information required to estimate the key statistics for the ISPA 2014 U.S. Spa Industry Study. The full survey was launched at the end of February 2014 and completed in May 2014.

The survey questionnaire was divided into two main parts. The first part asked respondents to provide details for each of the 'Big Five' key statistics. The second part sought information on operating characteristics of spas, such as core spa services and compensation of employees. Spas were also asked about recent trends in their experience of key indicators, i.e., visits, client spending, revenues, hiring and profitability.

Contact details for spas invited to participate in the survey were obtained from the ISPA database of spa locations, containing information on 16,000 qualified spas. The ISPA database also provided the main data source for estimating the number of spa locations by type and region. The ISPA database is estimated to represent 79% of the industry.







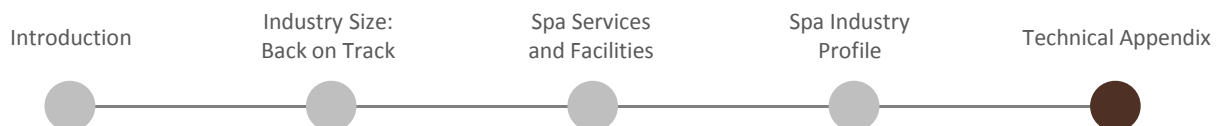
## The Questionnaire

The questionnaire for the ISPA 2014 U.S. Spa Industry Study was based on the questionnaire used for the ISPA 2013 U.S. Spa Industry Study. This was to ensure continuity and consistency with the 2010, 2011, 2012 and 2013 U.S. Spa Industry Studies. The questionnaire was developed in consultation with ISPA and refined through expert review and in-house testing of the structure and routing of the questionnaire.

As in the previous Industry Studies, the final version of the questionnaire comprised two main parts. The first part focused on collecting the information necessary to estimate the key statistics per spa establishment, i.e., revenues, visits, and employment. This section also asked spas about their indoor floor space and profits.

The second part of the questionnaire asked respondents to provide information on the operational aspects of their spa establishment, under the following headings:

- Product offering: Core spa services;
- Retail products and revenues;
- Staff compensation and benefits;
- Market trends.





## Survey Outcomes

The survey was launched on a custom Internet registration site in late February 2014 and ran until early May 2014.

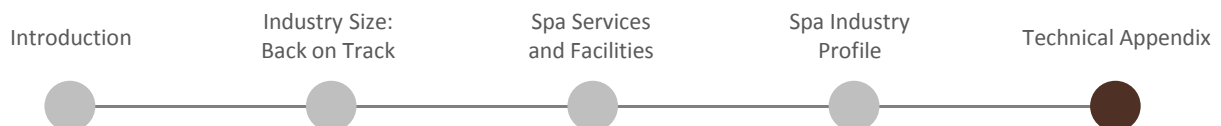
Results represent responses from 1,517 establishments. Those establishments were based on 561 survey returns that were submitted for either single locations or composite returns for multiple spa locations.

When compared to their share of all spa establishments, resort/hotel spas were over-represented in the sample while day spas were under-represented. The findings reported in this study have, therefore, been weighted to reflect the distribution of establishments by type of spa.

As the information for this study was collected from a sample of spas, the findings will inevitably be subject to margins of error. For proportions based on all respondents, the indicative margins of error at the 95% confidence level are  $\pm 4.5\%$ .

The margins of error are wider for sub-samples. Thus, for proportions based on all day spas, the margins of error are  $\pm 5.7\%$ . For proportions relating to resorts/hotels, the indicative margins of error are  $\pm 6.8\%$ .

Key ratios by spa type and region should be interpreted with caution. They are estimates based on a sample of spa establishments and are therefore subject to variability from sampling error. Special care should be taken in making comparisons with previous Spa Industry reports as estimates in those reports will also exhibit sampling error variability.





## Comparability Over Time

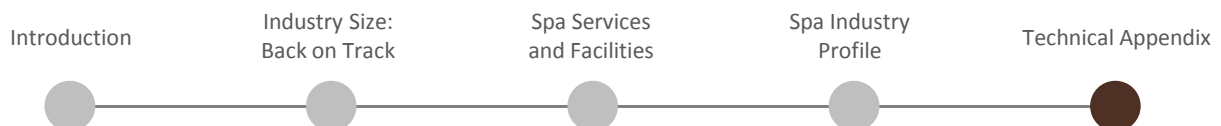
In 2005, ISPA undertook a census of the North American spa industry to formally qualify and classify spas. Through this process, ISPA developed specific product/service based criteria for qualifying and classifying spas. The spa type definitions are listed on page 6 of this report.

In order to develop revised estimates of the trend in the number and distribution of spas, data from previous studies was adjusted to be consistent with the revised definitions. Further detail on the re-estimation procedures can be found in the ISPA 2007 Spa Industry Study.

In particular, with the exception of destination spas, per spa estimates of revenue and square footage no longer include accommodations. Similarly, on-site retail and fitness operations that were not contained within the spa were specifically excluded from the statistics. Using data on the allocation of space and revenue from previous studies, these components were removed and the averages recalculated for comparability purposes.

The methodological changes were made to reflect the changing industry. As a result of the methodological changes, a greater emphasis was placed on narrowing the statistics to those activities that relate only to the spa.

While the estimates for studies undertaken prior to 2006 were adjusted to facilitate comparability and identification of industry trends, the pre-2005 estimates shown in pages 10-15 should nonetheless be treated with a degree of caution.





## International SPA Association

For more information on ISPA, write to, call or email:  
2365 Harrodsburg Road, Suite A325, Lexington, KY 40504;  
USA Domestic Telephone: 1.888.651.4772 or Direct: 1.859.226.4326;  
Email: [ispa@ispastaff.com](mailto:ispa@ispastaff.com)  
[www.experienceispa.com](http://www.experienceispa.com)

## 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 1.888.651.4772 or email [ispa@ispastaff.com](mailto:ispa@ispastaff.com). If consent is granted, attribution to ISPA and other sources specified in the document should be made. All rights reserved. ©2014

## International Survey Unit

This publication has been prepared for general guidance on matters of interest only, and does not constitute professional advice. You should not act upon the information contained in this publication without obtaining specific professional advice. No republication or warranty (express or implied) is given as to the accuracy or completeness of the information contained in this publication, and, to the extent permitted by law, PricewaterhouseCoopers LLP, its members, employees and agents do not accept or assume any liability, responsibility or duty of care for any consequences of you or anyone else acting, or refraining to act, in reliance on the information contained in this publication or for any decision based on it.

©2014 PricewaterhouseCoopers LLP. All rights reserved. In this document, 'PwC' refers to PricewaterhouseCoopers LLP (a limited liability partnership in the United Kingdom) which is a member firm of PricewaterhouseCoopers International Limited, each member firm of which is a separate legal entity.

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

