ISPA CONSUMER SNAPSHOT VOL. IX

GOING ABOVE. AND WAY BEYOND.

The spa-going experience

ISPA FOUNDATION

CONTENTS

SETTING THE SCENE

The ISPA Foundation commissioned PwC to conduct a survey program to provide timely consumer insights relevant to the spa industry in the United States. The Consumer Snapshot Initiative generates invaluable quantitative data for the spa industry on real-life attitudes and opinions of a sample of the population at a specific point in time. This ninth edition of the Consumer Snapshot Initiative focuses specifically on the spa-going experience.

For the first time in the Consumer Snapshot Initiative, this survey focused on 1,000 U.S. spa-goers specifically (defined as people who have visited a spa in the last 12 months), and captured responses across every state in the U.S. The study explores spa through the lens of its customers, diving into their behaviors, preferences and experiences, with particular attention paid to both the role of the service provider and the use of technology within spas.

In order to obtain a reliable snapshot from the industry's consumers, the survey gathered insights from across a broadly representative section of the U.S. population and recorded the following demographics.

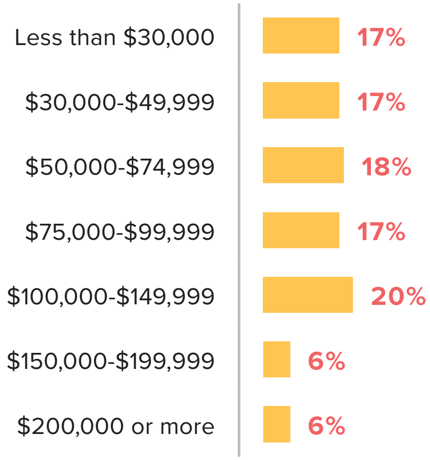
GENDER

FEMALE	MALE
51%	49%

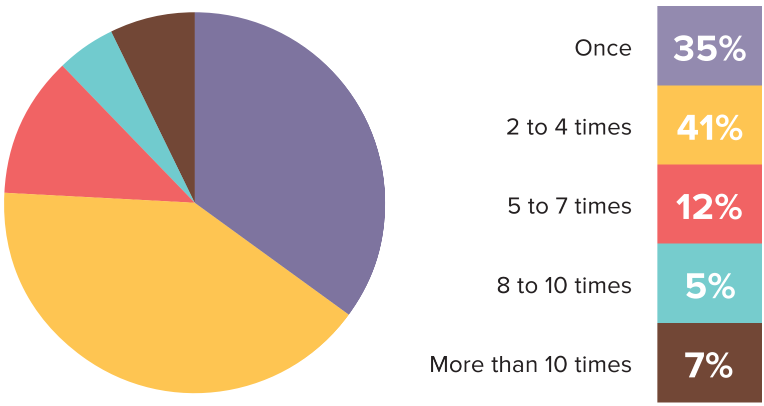
REGION

North East	18%
Midwest	21%
South	37%
West	24%

INCOME

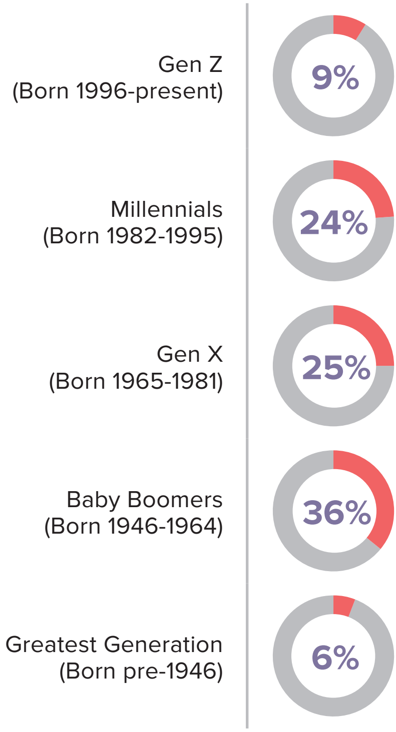


SPA VISITS (WITHIN THE LAST 12 MONTHS)



The previous edition of the Consumer Snapshot Initiative was the first that undertook an additional level of analysis by exploring the findings within the different generational groups. Based on the success of this approach and the insight it brings, the same method was used for this study, looking at five different generations.

GENERATION (AS A PERCENTAGE OF RESPONDENTS)



SPA-GOING BEHAVIORS

Trends around attendance

The majority of spa-goers reported they tended to visit the spa on their own (55%). However, there is also a sizeable population who view the spa as a social experience with over a quarter (26%) attending with a partner and 18% with a group of friends.

When looking at these figures across different demographics there are some interesting findings. Women are more likely to have visited on their own in the last year (59%) than men (51%) and yet, women (21%) appear more likely to visit a spa as part of a group of friends than men (15%). Men (37%), on the other hand, are more likely to visit with a partner compared to just 16% of women. The data also reveals some interesting differences between generations when it comes to socializing at the spa, with Gen Z the most likely to visit with a group of friends (30%). This figure then drops moving up different generations through millennials (24%), Gen X (17%), Baby Boomers (12%) and the Greatest Generation (11%).

A look at income also reveals a trend showing that likelihood to visit with a partner increases with earnings. The wealthiest spa-goers ($100,000+ income) are most likely to visit with their partner, with 34% doing so compared to just 15% of visitors earning less than $30,000.

HOW DO PEOPLE VISIT A SPA?

	TOTAL	MALE	FEMALE
Alone	55%	51%	59%
With my partner	26%	37%	16%
As part of a group of friends	18%	15%	21%
With my parents/family	11%	8%	14%
For a special occasion	5%	2%	7%
For a bachelor(ette) party	1%	1%	0%
Other	1%	1%	1%

BOOKING PREFERENCES

When looking at how spa-goers prefer to book appointments, it appears that the traditional methods are still more popular than more modern digital appointment-making methods. Nearly half prefer to make appointments over the phone (44%) and over a quarter (27%) prefer to book in person or at reception. When looking at online methods of booking, these are dominated by booking on a website (25%), compared to a very small 2% for booking by social media or mobile apps respectively. This could highlight how spa-goers value the personal skills of staff dealing with bookings either at reception or over the phone. It also suggests that there is an opportunity for spas to look at how to make clients more comfortable booking online, or using other digital methods, to take the pressure off more manual traditional services. This could be improving existing online booking capabilities or, for some spas, creating those options for the first time.

A look at the data for different genders uncovers differences within the traditional methods of booking, with women displaying a preference for phone bookings (50% compared to men, 37%). The data also suggests that men are more comfortable booking appointments in person (31% compared to women, 22%). It appears that the more regular spa-goers prefer to book in person (36% versus 24% for infrequent spa-goers), while the reverse is true for booking over the phone, as less frequent spa attenders show a preference for this method (48% for infrequent versus 30% for regular spa-goers). Perhaps this preference for in-person bookings among regular spa-goers is due to ease, as

PREFERRED BOOKING METHODS BY GENDER

	TOTAL	MALE	FEMALE
Over the phone	44%	37%	50%
In person/at reception	27%	31%	22%
Online via website	25%	26%	25%
Online via social media	2%	1%	2%
Via mobile apps	2%	3%	1%
Other	1%	1%	0%

they are more likely to be in a spa to make the booking in-person or are making repeat bookings, something spas should keep in mind. Equally, this could in part be due to how comfortable or ‘at ease’ they feel interacting with spa professionals overall.

PREFERRED BOOKING METHODS BY GENERATION

	TOTAL	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS	GREATEST GENERATION
Over the phone	44%	44%	40%	39%	50%	38%
In person/at reception	27%	28%	26%	25%	26%	36%
Online via website	25%	22%	30%	28%	22%	18%
Online via social media	2%	3%	3%	2%	0%	0%
Via mobile apps	2%	3%	1%	6%	0%	3%
Other	1%	0%	0%	0%	1%	5%

Interestingly, the data does not demonstrate any difference between the generations when it comes to booking preferences. Where you might expect to see more of a preference for online methods among the youngest, tech-savvy Gen Z, they actually exhibit extremely similar preferences to the average (44% prefer booking over the phone and 28% prefer booking in person). These figures could question the effectiveness and availability of current online and automated booking options. Whereas other industries, such as transport and tourism, are creating huge growth in online and automated booking, why is the same not happening in the spa industry? It will be important for spas to consider what can be done to improve these options in order to take the pressure off the more traditional methods.

SPA SERVICES

Unsurprisingly, when asked which services they experienced in the last year, over two thirds of spa-goers highlighted receiving massage services (67%), followed by skin care (35%) and nail services (30%). The figures for skin care and nail services are driven primarily by high usage among women, so a look at gender reveals some difference in preferences. Where women are seen to be preferring massage (70%), nail services (47%) and skin care services (45%), men are more likely to report receiving some slightly different services like massage (64%), body services (30%) and fitness services (29%). Although perhaps historically considered separate from 'spa', the popularity of fitness services among men represents a big opportunity for the industry to target a new group of potential spa-users. Similarly, it makes sense that the growing interest generally in fitness across the generations contributes to growing demand for these services within a spa.

Looking at the most popular spa services in the last year from a generational perspective paints a similar picture; however, it looks as though there are some differences when it comes to the less common services. For millennials, 18% have experienced complementary/alternative therapies while 11% have tried healthy-living programs. Similar figures can be seen for spa-goers from Gen X at 13% and 14% respectively. These figures stand out when compared to other generations and suggest that millennials and Gen X are potentially more open to these services than other generations. In addition, millennials also stand out as more likely to have received medically supervised services (12%).

As expected, more regular spa-goers tend to have experienced a greater range of services and, while this might not be a shock, it suggests that regular spa-goers like to experience a broad range of treatments rather than always having the same services each time they visit, or perhaps even enjoy multiple treatments on each occasion.

SERVICES EXPERIENCED IN THE SPA (IN THE LAST 12 MONTHS)

	TOTAL	MALE	FEMALE
Massage Services	67%	64%	70%
Skin Care Services	35%	25%	45%
Nail Services	30%	12%	47%
Body Services	27%	30%	24%
Fitness or Sports Services	19%	29%	10%
Hydrotherapy Services	16%	20%	11%
Complementary/ alternative Therapies	11%	13%	10%
Healthy-living Programs	10%	14%	5%
Medically Supervised Services	7%	11%	4%
Other	2%	3%	2%

Treatment spend

Looking at how much spa-goers spend on treatments reveals that average spending is strong, with nearly half of all spa-goers reporting that they spent more than $80 on treatments on their most recent visit (47%). More women tend to spend $80+ on treatments than men (52% compared to 43%) and, when looking at the different generations, millennials (56%) and Gen X (53%) stand out as the groups most likely to spend upwards of $80 on treatments, probably due to a greater level of disposable income among the generations most likely to be in work. These figures contrast with other generations who are considerably less likely to spend similar amounts (Gen Z - 38%, Baby Boomers - 44% and the Greatest Generation - 30%). The data also shows how more regular spa-goers tend to spend more on treatments per visit than infrequent spa-goers (54% spending more than $80 compared to 45%) annually.

TREATMENT SPEND

	TOTAL	MALE	FEMALE
$80 or less	46%	52%	41%
More than $80	47%	43%	52%
Used a gift card instead	6%	5%	7%

SPA RETAIL

When it comes to customer spending on retail products, the majority did make a retail purchase on their last visit (58%) - an encouraging statistic for the industry. All the same, retail still has the potential to be a strong growth area for the industry as over a third (36%) did not purchase any retail products. This suggests spas can still do a lot more to drive the sale of retail products to their customers - especially for female customers, with the data showing that women are more likely to spend nothing on retail at 39% (compared to men at 32%). Retail is a huge area of opportunity for the industry, and with many spas not having a retail offering, many are potentially missing out on an additional revenue stream - one that appears to be a positive contributor to the spa experience as a whole.

RETAIL PURCHASES (MOST RECENT VISIT)

	TOTAL	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS	GREATEST GENERATION
Made a purchase	58%	57%	72%	68%	47%	21%
Did not make a purchase	36%	35%	25%	27%	43%	69%
Used a gift card instead	6%	7%	2%	5%	9%	10%

Baby Boomers and the Greatest Generation appear less likely to spend (43% and 69% respectively made no retail purchase on their most recent visit) while, once again, millennials and Gen X spa-goers are more likely to have purchased retail products on their most recent visit, with only approximately a quarter having not made a purchase. Encouragingly, it appears that more frequent spa-goers are more likely to spend more on retail products, with almost half of one-time spa-goers spending nothing (48%) on their most recent visit (dropping to 25% for regular spa-goers).

Retail purchasing behaviors

Looking in more detail at some of the trends of spa-goers purchasing retail products, 42% say they go to a spa with the intention of purchasing retail products ‘some’ or ‘all’ of the time. This figure becomes more interesting when looked at by gender, with a greater proportion of men (48%) than women (37%) going to spas generally intending to purchase retail products. This figure correlates with how much each gender actually spends on retail in spas, with men slightly more likely to have purchased a retail product.

The more regular spa-goers also tend to be greater purchasers of retail products, with just under two thirds (64%) intending to make a purchase ‘some’ or ‘all’ of the time. In comparison, infrequent spa-goers (35%) are much less likely to pick up retail products. In a similar vein to much of the report, the purchasing power of millennials (55%) and Gen X (53%) shines through as the generations that tend to be the most receptive to purchasing retail products from the spa.

More regular spa-goers are also more likely to only decide which products to buy after they've had a treatment (82% versus 75% for infrequent) and based on recommendations from the service provider (81% versus 70% for infrequent). While these figures are fairly high across the different groups, it indicates there is an opportunity for the industry to increase the number of infrequent visitors purchasing products. Educating these visitors less familiar with the spa on product options and giving a greater selling role to therapists in promoting products might go some way in making these visitors feel at ease and increasing spas' revenues.

INTENTION TO PURCHASE RETAIL

	TOTAL	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS	GREATEST GENERATION
Yes, every time	13%	10%	23%	19%	5%	0%
Yes, some of the time	29%	20%	32%	34%	25%	22%
No	55%	64%	42%	45%	68%	76%
Don't know	3%	6%	3%	2%	2%	3%

Purchasing products online

Over half of spa-goers (51%) purchased products online after visiting a spa in the last 12 months. Following similar product purchasing trends highlighted in other areas of this study, it is men who are more likely to purchase products online following a spa visit (55%) rather than women (47%). Both higher income (57% of those earning $100,000+) and more frequent spa-goers (67%) are also more likely to purchase products online having visited a spa compared to the average (51%). With so many spa-goers keen to purchase online, this could be a big earning opportunity for the spas that have a strong online offering. On the other hand, many spas are yet to venture into the world of online products - it is worth bearing in mind they could be missing out on this lucrative audience to the spas that do offer this as a service.

PURCHASING PRODUCTS ONLINE AFTER VISITING A SPA

	TOTAL	IRREGULAR	REGULAR
Yes, every time	14%	9%	27%
Yes, some of the time	38%	37%	40%
No	47%	51%	32%
Don't know	2%	2%	1%

GIFT CARD PURCHASES

Gift cards remain an important source of revenue for the spa industry with over two in five spa-goers having bought a gift card in the last year (42%). Men tend to be bigger purchasers of gift cards with nearly half having bought one in the last year (47%) - however, the proportion of women purchasing gift cards is by no means insignificant at over a third (36%). From a generational perspective, again millennials and Gen X stand out as the most likely purchasers of gift cards (54% and 56% respectively).

BOUGHT A GIFT CARD
(IN THE LAST 12 MONTHS)

	TOTAL	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS	GREATEST GENERATION
Yes	42%	28%	54%	56%	32%	10%
No	58%	72%	45%	44%	68%	90%

RECEIVED A GIFT CARD (IN THE LAST 12 MONTHS)

	TOTAL	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS	GREATEST GENERATION
Yes	44%	43%	53%	49%	36%	33%
No	56%	57%	46%	50%	64%	67%

Generally, it looks like men are more often the givers of gift cards from a spa and women are more likely to receive them. While most of the data for receiving gift cards follows similar trends to those who purchase gift cards, one thing that stands out is the difference between the proportion of Gen Z purchasing gift cards (28%) and the proportion receiving gift cards (43%). This could suggest that although purchasing gift cards isn't top of mind for Gen Z when visiting a spa (possibly as a result of having less disposable income), they do seem to welcome and appreciate the experience as a gift.

Spending and receiving spa gift cards

While the proportion of spa-goers purchasing gift cards is an important figure for the spa industry, it's also important to look at the value of the gift cards that are being purchased. A look at the figures reveals a positive story - over half of the gift cards purchased (52%) were worth more than $80. Regular spa-goers are more likely to spend $80+ on a gift card (62% versus 46% for infrequent), perhaps showing the value they see in visiting a spa. Interestingly, there is a similar trend looking at how much spa-goers receive when they are given a gift card, with regular spa-goers more likely to receive gift cards of $80+ (59% versus 46% for infrequent). Perhaps this suggests that people recognize the value that regular spa-goers get from a gift-card compared to less frequent visitors.

Generationally, Gen X seem to be the 'sweet-spot' for purchasing and receiving high value gift cards, with 63% spending more than $80 and 61% receiving cards worth more than $80.

THE MEANING OF SPA

When prompted to rate a series of words relating to the spa experience on a scale from one to five, where one means 'it doesn't come to mind at all' and five means 'it immediately comes to mind', the most popular words unsurprisingly relate to relaxation and rejuvenation. The three that most come to mind for spa-goers are stress-reducing (86%), refreshing (84%) and pampered (83%). An interesting point lies in the focus given to the health benefits of spa-going by regular attendees versus infrequent visitors. Regular attendees are more likely to agree that the words 'healthy' (78% versus 67%) and 'wellness' (78% versus 68%) come to mind when hearing the word 'spa'. The fact they are more likely to associate spa-going with health benefits could go some way to explaining why they are more regular users of spas.

Spa-goers from Gen X and Baby Boomer generations are also slightly more likely to consistently link the word 'spa' with health benefits. When thinking of 'health', 73% and 75% respectively feel this comes to mind (compared to the average 70%) and 73% and 74% for wellness (compared to the average 70%). This could be attributed to the life stage of people from these generations potentially having more of a focus on maintaining health and wellbeing than the younger generations behind them.

WHEN I HEAR ‘SPA,’ I THINK...

Reduces Stress 86%	Refreshing 84%	Pampered 83%	Luxury 78%
Healthy 70%	Wellness 70%	Indulgent 68%	Fun 68%
Expensive 59%	Sanctuary 54%	Unplugged 52%	Solitude 51%

(Respondents were asked to rate these statements on a scale of one to five where one means ‘does not come to mind at all’ and five means ‘immediately comes to mind’. Figure shown is the % who rated a word as ‘four’ or ‘five’.)

THE ROLE OF SERVICE PROVIDERS

Service providers have an important role to play in educating and advising their clients on a range of areas including product suggestions, health care ideas, and the benefits of spa-going. Across the board, the younger generations are more receptive/ welcoming to suggestions from their service provider while Baby Boomers and the Greatest Generation appear slightly less welcoming.

WHEN YOU ARE WITH THE SERVICE PROVIDER, DO YOU WELCOME...?

	TOTAL	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS	GREATEST GENERATION
Education on the products used during my treatment	74%	82%	86%	73%	70%	44%
Product suggestions	73%	78%	85%	76%	69%	33%
Professional recommendations for your lifestyle	72%	79%	83%	73%	65%	44%
Homecare health regime ideas	71%	74%	78%	71%	70%	46%
Education about the benefits of spa-going	69%	73%	80%	71%	63%	43%

Figures indicate the percentage of respondents who stated 'yes' to the above statements

The data suggests that regular spa-goers tend to be more open to suggestions and advice from service providers. It is possible this is a result of a higher level of trust between spa-goer and service provider built up through regular visits and interaction. A potentially important area of focus for the industry therefore should be on improving the service provider/spa-goer relationship with all spa-goers and trying to create that connection as early as possible.

Service provider gender

When it comes to the gender of service providers, almost half of spa-goers have no preference whatsoever (47%). A closer look into this does reveal, however, that the majority of women prefer female-only service providers (53%) with only 2% showing a preference for male-only service providers. Men, by comparison, show little preference either way, with the majority claiming to have no preference (51%).

GENDER PREFERENCE FOR SERVICE PROVIDERS

	MALE ONLY	FEMALE ONLY	NO PREFERENCE
Male	14%	36%	51%
Female	2%	53%	44%

Level of comfort with the spa experience

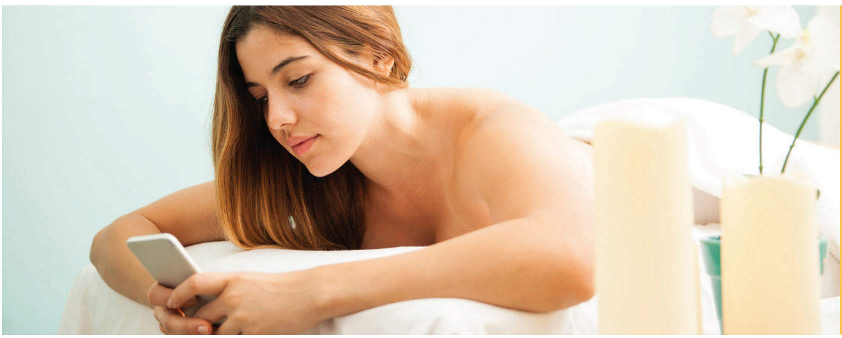
As a place of relaxation, it is crucial that spa-goers feel comfortable and welcome when visiting a spa. Positively, it looks like this is the case for the majority, with scores of broadly 80%+ across five measures relating to comfort with the spa experience. Overwhelmingly, spa-goers agreed that they felt comfortable during their spa experience (91%) and that staff acted professionally (92%). Most spa-goers noted that they were asked their preferences before their treatment (85%) and were aware that the spa had stated procedures and protocols (83%).

A look at these figures from a generational point of view highlights some interesting differences between Gen Z and the other generations with lower scores for Gen Z across all measures. Where the industry has seen millennials progress to join Gen X as the key consumers in spas, an important question lies in what can be done to continue to make Gen Z feel more comfortable in spas and support that young group on a similar journey as the 'up and coming' spa-going generation. The role of the service provider can be crucial here, in both making infrequent spa-users comfortable and educating them about the benefits of spa.

AGREEMENT STATEMENTS

	TOTAL	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS	GREATEST GENERATION
The staff acted professionally	92%	83%	89%	91%	97%	98%
I was comfortable throughout my spa experience	91%	81%	88%	91%	96%	93%
I was asked my preference before my treatment started	85%	73%	86%	85%	85%	90%
The spa had clearly stated procedures and protocols	83%	72%	86%	84%	83%	80%
The open/shared spaces were welcoming	81%	78%	82%	83%	80%	79%

(Respondents were asked to rate these statements on a scale of one to five where 'one' means 'strongly disagree' and five means 'strongly agree'. Figure shown is the % who rated the statement as 'four' or 'five'.)



TECHNOLOGY IN THE SPA

The study generated some interesting insights into what spas permit and what spa-goers want when it comes to using personal technology (namely smartphones) within the spa environment. When looking at the use of technology in spas, some variations begin to appear across different areas within the spa. Nearly three quarters (74%) of spa-goers reported being able to use their phones in the reception or open areas of the spa. Some spa zones, however, tend to have stricter policies on technology, particularly the treatment rooms (31%), the pool area (34%) and, to a lesser extent, the locker rooms (54%). A look at the different types of spa reveals that hotel/resort spas tend to be slightly more lenient when it comes to technology in different areas, although not significantly so.

ABILITY TO USE TECHNOLOGY WITHIN THE SPA DURING MOST RECENT SPA VISIT (% SAYING YES)

	TOTAL	DAY SPA	HOTEL/ RESORT SPA
Reception area/ open areas	74%	74%	76%
Locker rooms	54%	52%	61%
Pool areas	34%	31%	39%
Treatment rooms	31%	29%	33%

While, on the surface, the overwhelming majority (89%) feel that the balance is right when it comes to how strict/lenient technology policies are currently in spas. A deeper look reveals that men (13%), regular spa-goers (14%), millennials (14%) and Gen X (12%) are slightly more likely to feel that technology policies are too liberal and do not allow enough privacy.

However, the use of technology is not the ‘be all and end all’ when it comes to whether someone would choose to visit a spa, as nearly two-thirds (62%) of spa-goers feel that whether or not a spa has a ban on technology would have no impact on their decision to visit it. What's interesting, however, is that a technology ban is more likely to be seen as a positive thing than a negative, with 28% believing this would make a spa more attractive compared to just 10% who claim it would put them off.

It would appear that men are more likely than women to favor a tech-free environment in a spa. A look into the figures for gender also reveals that men are more likely to be receptive to a technology ban (32%) than women (24%) are. In fact, 13% of women would see a technology ban as a reason not to visit compared to 8% of men. Regular spa-goers are also more likely to view a technology ban as a positive aspect of a spa, with 39% claiming this would encourage them to visit (compared to 25% for infrequent spa-goers).

IMPACT OF A POTENTIAL TECHNOLOGY BAN

	TOTAL	MALE	FEMALE
Encourage me to visit a spa	28%	32%	24%
Has no impact on my decision to visit	62%	60%	64%
Would persuade me not to visit	10%	8%	13%

Millennials (36%) and Gen X (34%) spa-goers also stand out, with over a third of each generation feeling that a technology ban would make a spa more attractive. This echoes findings showing that millennials and Gen X are more likely to feel spa policies on technology are too liberal. Similarly, a larger proportion of higher income spa-goers are more likely to view technology policies as being too liberal (13% of those earning $100,000+), while two in five (40%) feel a total ban would encourage them to visit the spa.

	TOTAL	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS	GREATEST GENERATION
Encourages me to visit the spa	28%	22%	36%	34%	21%	18%
Has no impact on my decision to visit	62%	55%	51%	58%	71%	77%
Would persuade me not to visit	10%	22%	12%	8%	8%	5%

A look at this data suggests that the spa-goers more open to stricter policies on technology are those more likely to be in full-time employment - possibly those who, more than others, would appreciate the opportunity to switch off and see spa as an opportunity for a 'digital detox'. The figures from the U.S. regions tends to support this, with spa-goers from the North East (traditionally the location of some of the U.S.'s main commercial hubs) demonstrating more of an openness to a ban on technology (44% say they would support a technology ban compared to the average, 28%) than other parts of the country.

TECHNOLOGY POLICIES

	TOTAL	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS	GREATEST GENERATION
Too liberal/not enough privacy	10%	7%	14%	12%	6%	5%
A good balance between openness and privacy	89%	93%	84%	86%	93%	92%
Too strict	1%	0%	2%	2%	1%	3%

A special thank you is extended to the following supporters who made generous donations which helped make this research possible:

SURVEY METHODOLOGY

This survey for Vol. IX of the Consumer Snapshot Initiative gathered responses from a total of 1,000 responses from a sample of spa-goers in the U.S. The survey was undertaken using a broadly representative sample, which ensured the study achieved responses from a comprehensive cross-section of the U.S. population. It is important to remember that the results regarding spa attendance are self-reported by the snapshot participants and are not official statistics, nor can they necessarily be expected to be in line with what spas report in terms of overall spa-going numbers or the demographic composition of those using the facilities.

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About the Foundation

The ISPA Foundation is the 501(c)3 arm of ISPA and was created in 1999 to serve the educational and research needs of the industry. The ISPA Foundation's mission is to improve and enhance the value of the spa experience; their vision is to advance spa culture to sustain health and well-being.

The ISPA Foundation's objectives include being the educational source for the spa industry, establishing definitive research that validates spa industry-related topics and creating an endowment that sustains the ISPA Foundation in perpetuity.

The ISPA Foundation also wishes to thank the individuals and companies who have given generously over the years including those from the Charter Club Members (found on the ISPA website) to the annual ISPA Foundation Auction supporters who continue to make these research projects and the work of the Foundation possible.

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