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ISPA U.S. SPA INDUSTRY STUDY

COMPENSATION SUPPLEMENT

INTERNATIONAL SPA ASSOCIATION



Introduction

This report presents the findings from the employee compensation and benefits section of the ISPA 2018 U.S. Spa Industry Study. The study was commissioned by the International SPA Association (ISPA).

Established in 1991, ISPA is 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.

The compensation and benefits report has been prepared as a supplement to the main ISPA 2018 U.S. Spa Industry Study. It presents information on the following topics:

- **Full-time positions** within the spa industry.
- **Compensation levels** for employees occupying full-time spa director, manager, esthetician, massage therapist and nail technician positions within spas.
- **Average annual compensation** received by full-time spa employees.
- **Compensation structures** for service provider employees.
- Compensation structures in respect of **paid time off, paid education/training or paid sick leave**.
- **Unstaffed positions** for service providers.

Key Points Summary

Average annual compensation

- For the 2018 study, respondents were asked to state the **average annual compensation** (including gratuities) received by full-time service providers as well as directors and managers.
- Compensation levels for **spa directors** remain higher in resort/hotel spas compared to day spas. In the resort/hotel sector, the estimated average compensation was \$85,100 compared to \$64,500 in the day spa sector.
- Amongst spas employing **managers** on a full-time basis, the average compensation level in resort/hotel spas was \$53,900. In day spas, the average was estimated at \$45,100.
- Amongst spas employing **estheticians** on a full-time basis, the average salary was estimated at \$45,700, ranging from \$42,400 in day spas to \$51,000 in resort/hotel spas.
- Amongst spas employing **massage therapists** on a full-time basis, the annual compensation level was \$41,900 across all spas. The average was higher in resort/hotel spas (\$53,900) compared to day spas (\$39,100).
- Amongst spas employing **nail technicians** on a full-time basis, the estimated average annual compensation level was \$32,800. Among resort/hotel spas, the estimated average was \$39,300 compared to \$31,800 in the day spa sector.
- It is, however, important to note that **compensation levels vary considerably** around the average levels quoted above, both by category of employee and by spa type. Those variations are discussed in further detail in this report

Compensation structures

- For each type of service provider (estheticians, massage therapists and nail technicians), **straight hourly pay plus commission on services** was the most frequently quoted compensation structure (48% average for estheticians, 47% for massage therapists and 39% for nail technicians).
- **Straight commission on services** was mentioned by 28% of respondents in respect of massage therapists and a similar proportion (26%) for estheticians. One in three spas (34%) said they use that structure for nail technicians.
- **Straight hourly pay** was quoted by 23% of spas in respect of estheticians, 21% for massage therapists and 32% for nail technicians.

Key Points Summary

Compensation structures for service provider employees: Paid time off

- When asked to select the compensation structure used for service provider employees in respect of paid time off, paid education/training or paid sick leave, a large majority of spas in each service provider category said they use **straight hourly pay**. The proportions citing that structure ranged from 63% in respect of massage therapists to 77% for nail technicians.

Hours necessary to be considered a full-time employee

- Spas were asked to say how many hours their service providers need to work in order to be considered a full-time employee. On average, respondents said service providers had to work at least **30 hours per week** to be considered a full-time employee. Of course, the actual number of hours worked may be greater than the minimum necessary for full-time status.

Unstaffed Positions

- When asked if they have any unstaffed service provider positions that they are actively trying to fill, **67%** of spas answered in the affirmative.
- The number of unfilled service provider positions is estimated at **35,480** of which **16,990** are full-time and **18,490** part-time.
- **Massage therapists** account for the largest number of unfilled positions that spas are currently trying to fill, a total of **20,110** representing 57% of unfilled positions.
- **Estheticians** account for an estimated **8,360** unstaffed positions (24%).
- The remaining **7,010** positions are for **nail technicians** (20%).
- Spas saying that they have unstaffed positions were asked to also say how many spa director and spa manager positions they are actively trying to fill. The estimated number of unstaffed **spa director positions** is **530** with a further **2,010 spa manager positions**.

Structure of the Report

The remainder of this report is structured as follows. To set the context, it commences with a brief overview on the survey findings for employment by type of spa. The main 2018 Industry Study report contains more detailed information on employment levels, including recent and historical trends. The next part of the report outlines the survey results for full-time positions by type of spa, including the proportion of spas employing full-time spa directors, managers, estheticians, massage therapists and nail technicians.

This report then presents the detailed findings for compensation of full-time employees occupying spa director, manager, esthetician, massage therapist and nail technician positions within spas. The next section presents the survey findings for compensation structures for service providers, followed by a discussion of compensation structures in respect of paid time off, paid education/training or paid sick leave. The report concludes with the estimates for the numbers of unstaffed service provider positions, and also unfilled positions for spa directors and managers.

The methodology for implementing the survey is described in the main ISPA 2018 U.S. Spa Industry Study report. The definitions of types of spas used in the Industry Study are reproduced at the end of this report.

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

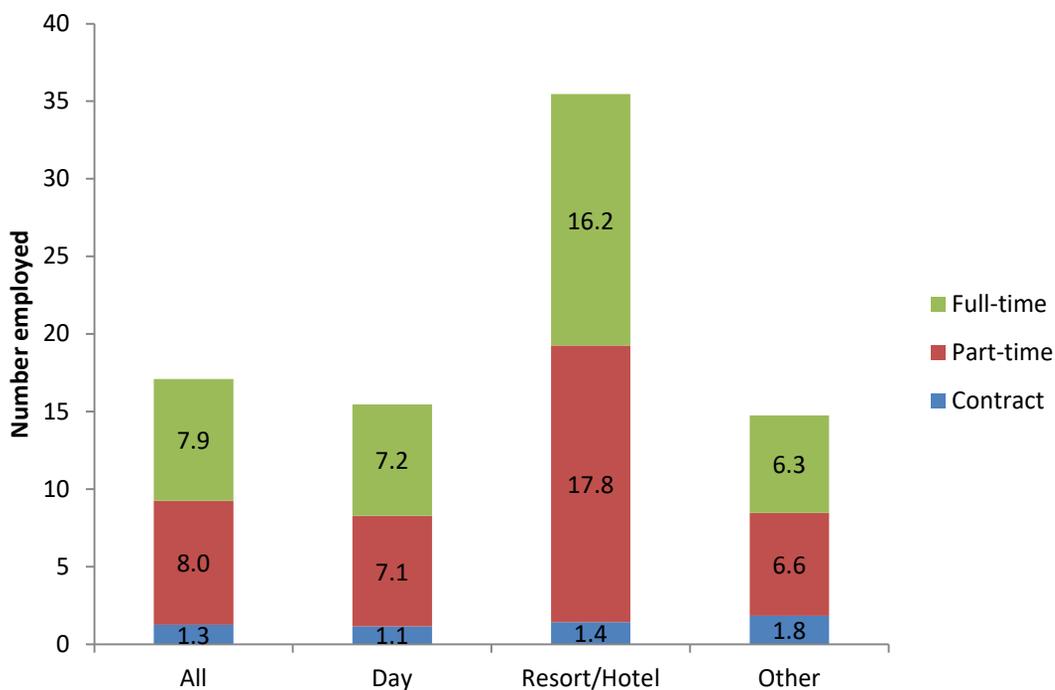
Employment

The total number employed in the spa industry is estimated at 372,100 as of May 2018, comprising 170,900 full-time employees, 173,900 part-time employees and 27,300 contract workers.

There are 21,770 spa locations across the U.S., giving an average of 17.2 employees per spa establishment.

Employment levels are highest in resort/hotel spas, with 35.4 workers on average compared to an average of 15.4 per establishment in the day spa sector. However, it should be noted that day spas account for a large majority (80%) of all spa establishments and hence also the largest share of spa industry employment (72%).

Average employment per spa



Full-Time Positions by Type

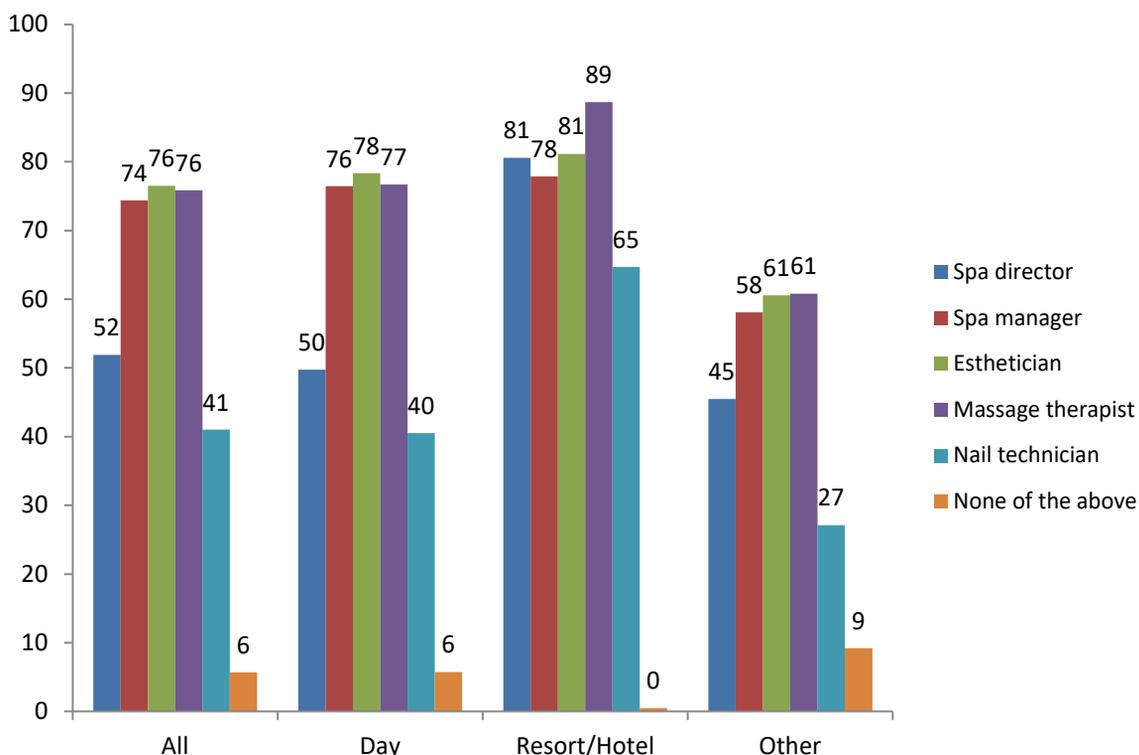
Spas were asked to say whether they employ people on a full-time basis in the positions of spa director, spa manager, esthetician, massage therapist and/or nail technician. The responses varied by type of spa, with resort/hotel spas more likely than day spas to employ people on a full-time basis in one or more of those positions.

A large majority of resort/hotel spas (81%) said they employ a full-time spa director, compared with 50% of day spas. Almost four in five resort/hotel spas (78%) employ a full-time spa manager compared with 76% of day spas.

Compared to day spas, resort/hotel spas are more likely to employ service providers (i.e., estheticians, massage therapists and nail technicians) on a full-time basis.

Six percent of spas indicated that they have no full-time employees in management positions or providing services. These are mainly owner-run spas (73%), primarily in the day spa sector. They also employ part-time staff (32%) and/or independent contractors (46%) rather than full-time employees.

Full-time positions by type (% of spas)



Hours Necessary to be Considered Full-time Employee

Spas were asked to say how many weekly hours their service providers need to work in order to be considered a full-time employee. On average, respondents said service providers had to work at least 30 hours per week to be considered a full-time employee.

It should be noted that the number of hours necessary to be considered a full-time employee is a threshold value. The actual number of hours worked may be greater than the threshold.

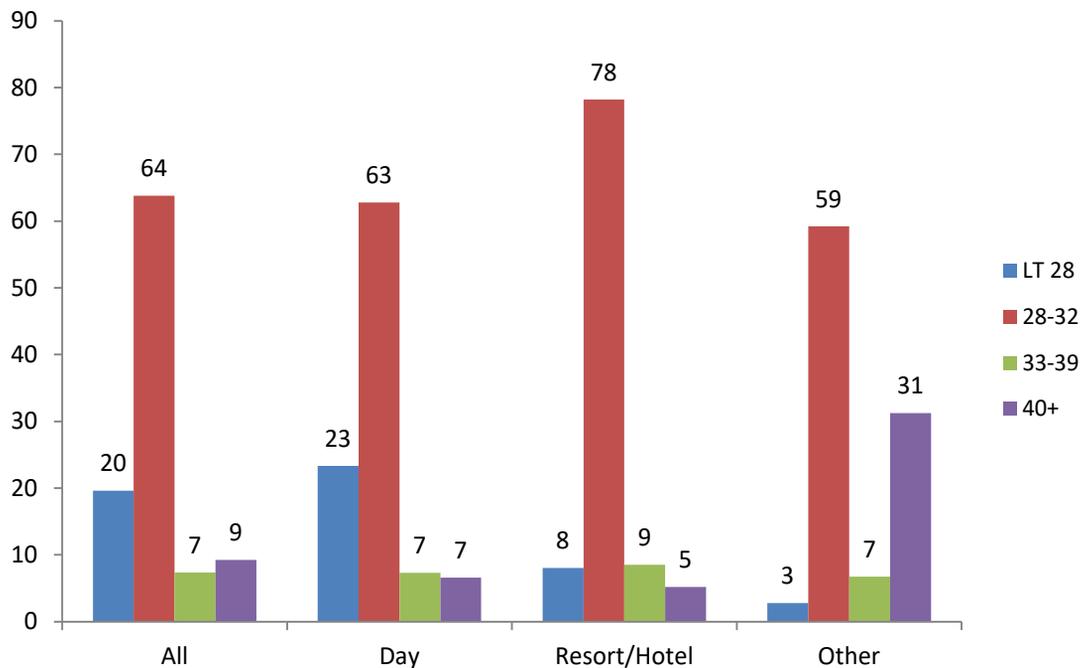
The average number of hours necessary for full-time status did not vary greatly by type of spa. Almost two in three day spas (63%) gave a value in the range of 28-32 hours. A large majority of resort/hotel spas (78%) also gave a figure in the range 28-32 hours.

Across all spa types, the most frequently reported minimum was 30 hours, quoted by 37% of day spas and 50% of resort/hotel spas.

Weekly hours necessary to be considered a full-time employee: Average

	All	Day	Resort/Hotel	Other
Average	30	30	31	34

**Hours necessary to be considered a full-time employee
(% of spas)**



Average Annual Compensation

For the 2018 study, respondents were asked to state the average annual compensation (including gratuities) received by full-time service providers as well as directors and managers.

Among day spas, the average compensation levels quoted for service providers ranged from \$42,400 for estheticians to \$31,800 for nail technicians.

Compensation levels for service providers working in the resort/hotel sector are higher than in day spas, on average. They range from \$53,900 for massage therapists to \$39,300 for nail technicians.

The estimated average compensation level for spa managers is \$45,100 in day spas compared to \$53,900 in resort/hotel spas.

The difference in compensation levels between day spas and resort/hotel spas is most pronounced in relation to spa directors, with an average annual compensation level of \$85,100 in resort/hotel spas compared with \$64,500 in day spas.

The figures presented in the table below are averages for each position. Compensation levels vary considerably around the average levels, both by category of employee and by spa type. Those variations are shown in further detail in the next part of this report.

Average annual compensation (including gratuities), full-time individuals

	All	Day	Resort/Hotel
Spa directors	\$69,100	\$64,500	\$85,100
Spa managers	\$47,400	\$45,100	\$53,900
Esthetician	\$45,700	\$42,400	\$51,000
Massage therapist	\$41,900	\$39,100	\$53,900
Nail technician	\$32,800	\$31,800	\$39,300
Average, all positions	\$41,500	\$38,900	\$48,800

Note: Base = spas employing 1+ full-time employees.

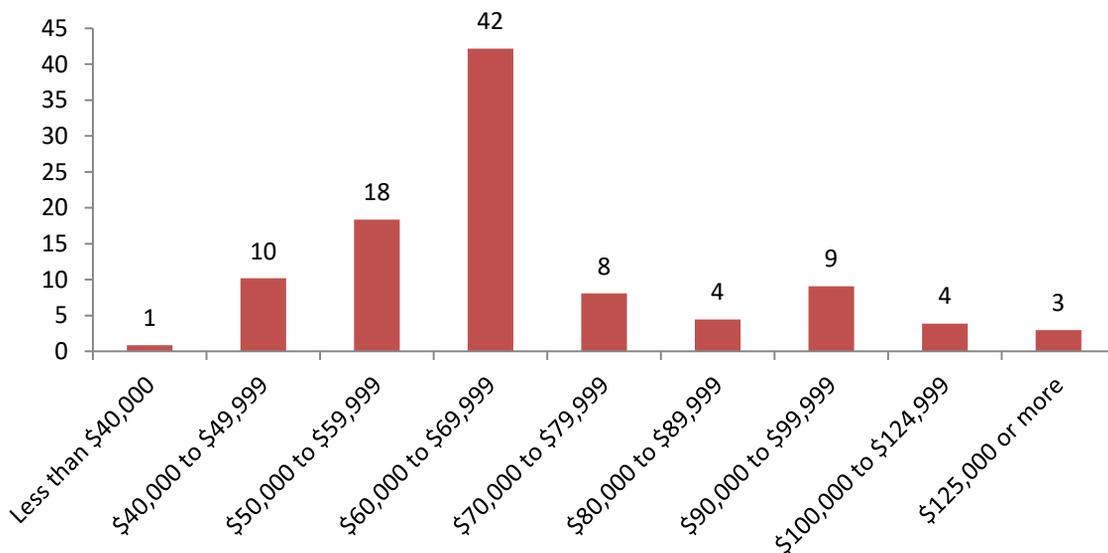
Spa Director Compensation

Spa director compensation levels vary widely around the average of \$69,100. A little over four in 10 (42%) receive compensation in the range of \$60,000 to \$69,999 with 28% earning \$70,000 or more and a similar proportion (29%) earning under \$60,000.

In the day spa sector, where 50% of establishments employ a spa director, one in two spas (50%) said their annual compensation level for that position was in the range of \$60,000 to \$69,999. One in three day spas (34%) quoted an annual compensation level under \$60,000 with the remaining 16% reporting a compensation level of \$70,000 and above.

By contrast, in the resort/hotel spa sector, where 81% said they employ a spa director, over one in two (53%) reported that their spa directors received compensation in excess of \$80,000, including 23% earning \$100,000 or more. Almost four in 10 (39%) quoted a salary in the range of \$60,000 to \$79,999. The proportion earning less than \$60,000 was 8%.

Spa director compensation (%)



Average annual compensation (including gratuities), Spa directors

	All	Day	Resort/Hotel
Spa directors	\$69,100	\$64,500	\$85,100

Note: Base = spas employing 1+ full-time spa directors.

Spa Director Compensation by Type of Spa

Annual compensation, full-time employees

	All	Day	Resort/Hotel
Less than \$40,000	1%	1%	0%
\$40,000 to \$49,999	10%	12%	1%
\$50,000 to \$59,999	18%	22%	7%
\$60,000 to \$69,999	42%	50%	23%
\$70,000 to \$79,999	8%	6%	16%
\$80,000 to \$89,999	4%	3%	13%
\$90,000 to \$99,999	9%	5%	18%
\$100,000 to \$124,999	4%	0%	16%
\$125,000 or more	3%	2%	7%

Note: Base = spas with full-time spa directors.

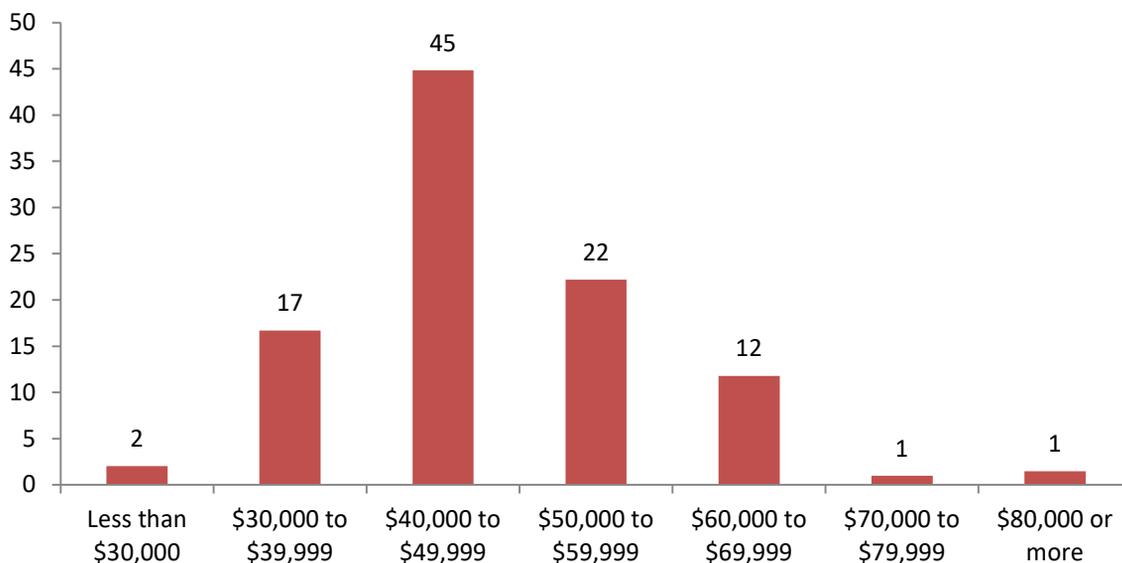
Spa Manager Compensation

Among spas employing managers on a full-time basis (74%), almost one in two spas (45%) said managers receive compensation in the range of \$40,000 to \$49,999. A little over one in three (36%) quoted a salary of \$50,000 and above with the remaining 19% saying their managers receive less than \$40,000.

In the day spa sector, where 76% said they employ a full-time spa manager, a little over one in two respondents (52%) quoted an average compensation level in the range of \$40,000 to \$49,999. One in four day spas (26%) said their managers receive \$50,000 and above with the remaining 22% reporting a compensation level of less than \$40,000.

In the resort/hotel sector, where 78% of spas employ a manager, one in three respondents said their managers receive compensation in the range of \$50,000 to \$59,999. The proportion of resort/hotel spas reporting a compensation level below \$50,000 was 38% with the remaining 29% saying their managers receive \$60,000 and above.

Spa manager compensation (%)



Average annual compensation (including gratuities), Spa managers

	All	Day	Resort/Hotel
Spa managers	\$47,400	\$45,100	\$53,900

Spa Manager Compensation by Type of Spa

Annual compensation, full-time employees

	All	Day	Resort/Hotel
Less than \$30,000	2%	2%	1%
\$30,000 to \$39,999	17%	20%	9%
\$40,000 to \$49,999	45%	52%	28%
\$50,000 to \$59,999	22%	19%	33%
\$60,000 to \$69,999	12%	6%	19%
\$70,000 to \$79,999	1%	0%	7%
\$80,000 or more	1%	0%	3%

Note: Base = spas with full-time spa managers.

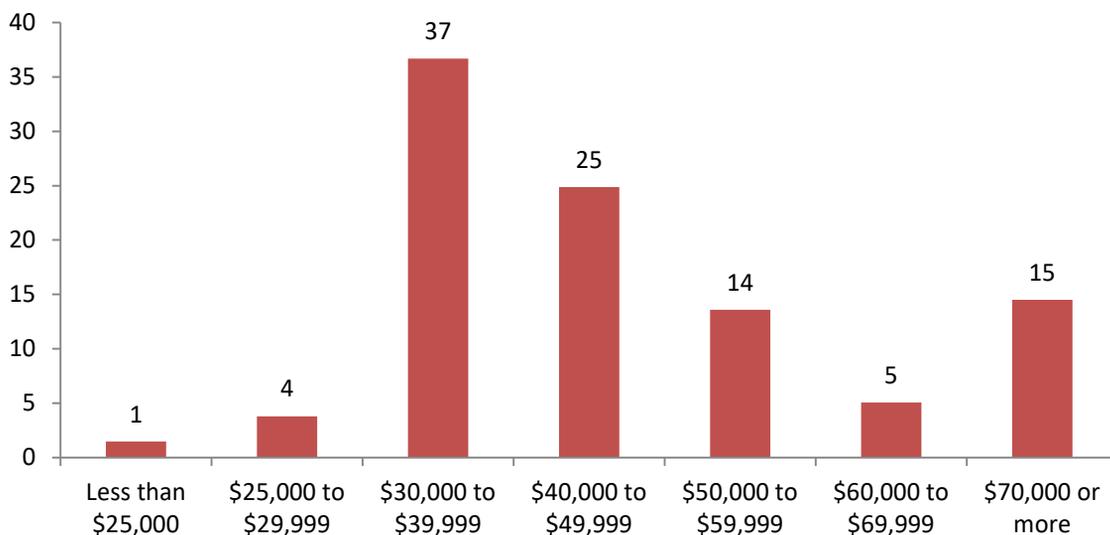
Esthetician Compensation

Amongst spas employing estheticians on a full-time basis (76%), one in four spas (25%) quoted a compensation level in the range of \$40,000 to \$49,999. One in three spas (34%) said their estheticians receive \$50,000 or more with 42% reporting a figure of less than \$40,000.

In the day spa sector, where 78% said they employ one or more full-time estheticians, one in four spas said their estheticians receive annual compensation in the range of \$40,000 to \$49,999. One in two day spas (49%) gave an annual compensation level less than \$40,000 while 25% said their estheticians earn \$50,000 or more.

In the resort/hotel spa sector, where 81% said they employ one or more full-time estheticians, compensation levels were more skewed towards the upper end of the salary range compared to the day spa sector. One in two resort/hotel spas quoted a compensation level of \$50,000 or above. One in four said that compensation levels were in the range of \$40,000 to \$49,999 with the remaining 25% giving a salary below \$40,000.

Esthetician compensation (%)



Average annual compensation (including gratuities), Estheticians

	All	Day	Resort/Hotel
Esthetician	\$45,700	\$42,400	\$51,000

Note: Base = spas employing 1+ full-time estheticians.

Esthetician Compensation by Type of Spa

Annual compensation, full-time employees

	All	Day	Resort/Hotel
Less than \$25,000	1%	1%	4%
\$25,000 to \$29,999	4%	4%	4%
\$30,000 to \$39,999	37%	44%	17%
\$40,000 to \$49,999	25%	25%	25%
\$50,000 to \$59,999	14%	14%	19%
\$60,000 to \$69,999	5%	5%	13%
\$70,000 or more	15%	7%	18%

Note: Base = spas with full-time estheticians.

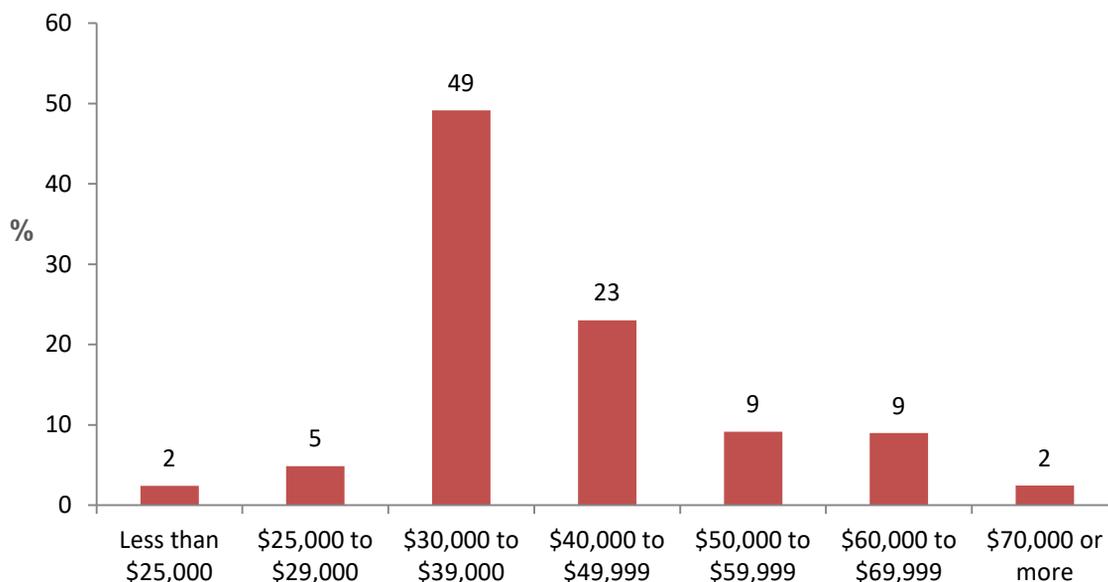
Massage Therapist Compensation

Amongst spas employing massage therapists on a full-time basis (76%), 49% quoted an annual compensation level in the range of \$30,000 to \$39,999. Almost one in four (23%) reported a compensation level between \$40,000 and \$49,999 with a further one in five (20%) saying massage therapists earn \$50,000 and above.

In the day spa sector, where 77% said they employ one or more full-time massage therapists, \$30,000 to \$39,999 was the most frequently cited compensation level (56%). Just under one in four (23%) said compensation levels were in the range of \$40,000 to \$49,999 with 12% quoting a figure of \$50,000 and above.

In the resort/hotel spa sector, where 89% said they employ one or more full-time massage therapists, 58% of respondents said that compensation levels were in the range \$50,000 and above. Over one in five (22%) said compensation levels were between \$40,000 to \$49,999 with the remaining 20% saying compensation levels were under \$40,000.

Massage therapist compensation (%)



Average annual compensation (including gratuities), Massage therapists

	All	Day	Resort/Hotel
Massage therapist	\$41,900	\$39,100	\$53,900

Note: Base = spas employing 1+ full-time massage therapist.

Massage Therapist Compensation by Type of Spa

Annual compensation, full-time employees

	All	Day	Resort/Hotel
Less than \$25,000	2%	3%	2%
\$25,000 to \$29,999	5%	5%	4%
\$30,000 to \$39,999	49%	56%	14%
\$40,000 to \$49,999	23%	23%	22%
\$50,000 to \$59,999	9%	5%	14%
\$60,000 to \$69,999	9%	7%	27%
\$70,000 or more	2%	0%	17%

Note: Base = spas with full-time massage therapists.

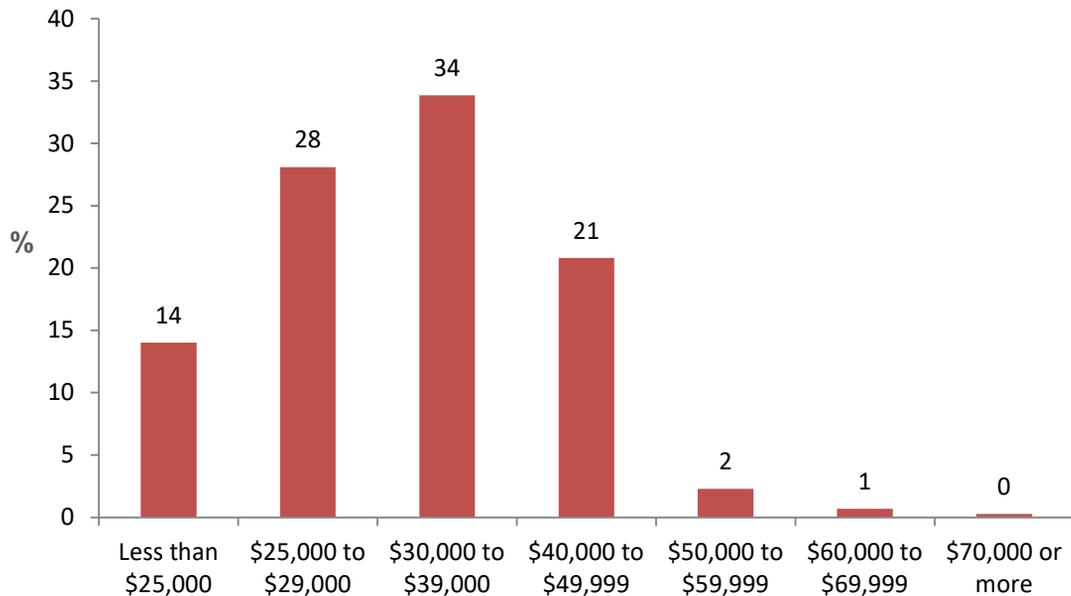
Nail Technician Compensation

Amongst spas employing nail technicians on a full-time basis (41%), one in three (34%) said the annual compensation level was in the range of \$30,000 to \$39,000. Almost one in four spas (24%) reported compensation levels of \$40,000 and above while 42% said that nail technicians' annual compensation level was below \$30,000.

In the day spa sector, where 40% said they employ one or more full-time technicians, 50% said compensation levels were less than \$30,000. Almost one in three (30%) quoted a figure in the range of \$30,000 to \$39,999 with the remaining 21% saying their nail technicians earn \$40,000 and above.

In the resort/hotel spa sector, where 65% said they employ one or more full-time nail technicians, one in three respondents said that compensation levels were in the range of \$30,000 to \$39,999. One in five said compensation levels were below \$30,000 while 48% cited compensation levels of \$40,000 or more.

Nail technician compensation (%)



Average annual compensation (including gratuities), Nail technicians

	All	Day	Resort/Hotel
Nail technician	\$32,800	\$31,800	\$39,300

Note: Base = spas employing 1+ full-time nail technician.

Nail Technician Compensation by Type of Spa

Annual compensation, full-time employees

	All	Day	Resort/Hotel
Less than \$25,000	14%	16%	7%
\$25,000 to \$29,000	28%	33%	13%
\$30,000 to \$39,000	34%	30%	33%
\$40,000 to \$49,999	21%	20%	29%
\$50,000 to \$59,999	2%	1%	12%
\$60,000 to \$69,999	1%	0%	5%
\$70,000 or more	0%	0%	2%

Note: Base = spas with full-time nail technicians.

Compensation Structures for Service Provider Employees

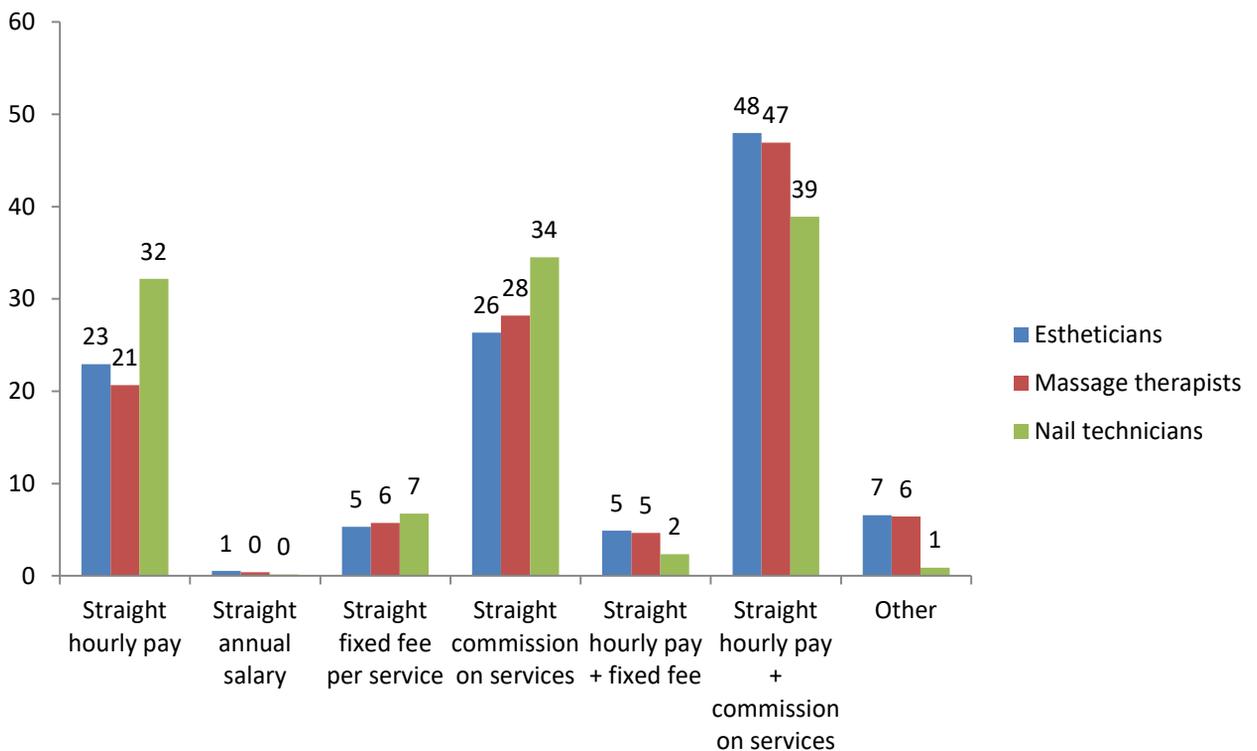
Compensation structures tend not to vary greatly by type of service provider. For each type of service provider, straight hourly pay plus commission on services was the most frequently mentioned structure, followed by straight commission of services and straight hourly pay.

The two following page show compensation structures by type of spa for each of the three service provider categories.

Among day spas, straight hourly pay plus commission on services was most frequently mentioned for estheticians and massage therapists.

In the resort/hotel sector, straight hourly pay plus commission on services was the most frequently mentioned structure across each category of service provider, followed by straight commission of services.

Compensation structures – service provider employees (%)



Respondents to the survey were provided with the following definitions:

Hourly pay - the service provider receives a fixed amount per hour for each hour they work.

Commission - the service provider receives a percentage amount for each of the services they perform. The employees' earnings are determined by the revenue they generate.

Fixed/flat fee - a fixed dollar amount for each treatment.

In selecting a compensation structure, respondents were asked to consider employees' typical work structure in a standard week, excluding paid time off, training, service fees and gratuities.

Compensation Structures for Service Provider Employees: Estheticians

	All	Day	Resort/Hotel
Straight hourly pay	23%	21%	7%
Straight annual salary	1%	0%	1%
Straight fixed fee per service	5%	5%	9%
Straight commission on services	26%	25%	25%
Straight hourly pay + fixed fee	5%	4%	17%
Straight hourly pay + commission on services	48%	47%	49%
Other	7%	8%	0%

Compensation Structures for Service Provider Employees: Massage therapists

	All	Day	Resort/Hotel
Straight hourly pay	21%	21%	7%
Straight annual salary	0%	0%	1%
Straight fixed fee per service	6%	5%	9%
Straight commission on services	28%	28%	23%
Straight hourly pay + fixed fee	5%	4%	16%
Straight hourly pay + commission on services	47%	45%	51%
Other	6%	8%	1%

Compensation Structures for Service Provider Employees: Nail technicians

	All	Day	Resort/Hotel
Straight hourly pay	32%	33%	10%
Straight annual salary	0%	0%	1%
Straight fixed fee per service	7%	7%	8%
Straight commission on services	34%	37%	29%
Straight hourly pay + fixed fee	2%	0%	17%
Straight hourly pay + commission on services	39%	39%	49%
Other	1%	1%	0%

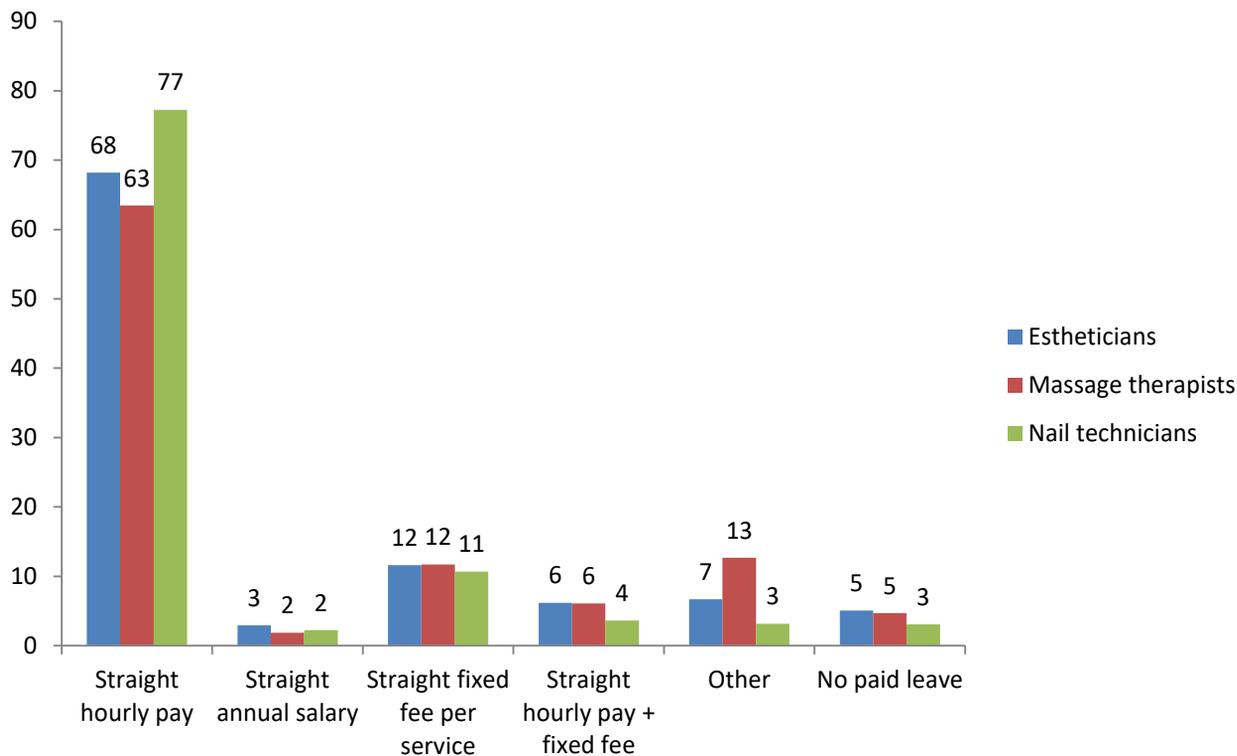
Compensation Structures for Service Provider Employees: Paid time off

When asked to select the compensation structure used for service provider employees in respect of paid time off, paid education/training or paid sick leave, a large majority of spas in each service provider category said they use straight hourly pay, ranging from 63% for massage therapists to 77% for nail technicians.

The use of straight hourly pay as a compensation structure for paid time off varied only slightly by type of spa. Resort/hotel spas were most likely to say they use straight hourly pay, mentioned by 74% to 76% across the service provider categories. Among day spas, 65% said they use straight hourly pay to compensate estheticians with 64% citing that structure for massage therapists and 76% for nail technicians.

Very few spas make no provision for paid time off, between 3% to 5% across the service provider types.

Compensation structures – service provider employees: Paid time off (%)



Unstaffed Positions: Service providers

When asked if they have any unstaffed service provider positions that they are actively trying to fill, 67% of spas answered in the affirmative, including 68% of resort/hotel spas, a similar proportion of day spas (68%) and 56% of other spas. The number of unfilled service provider positions is estimated at 35,480 of which 16,990 are full time and 18,490 part-time.

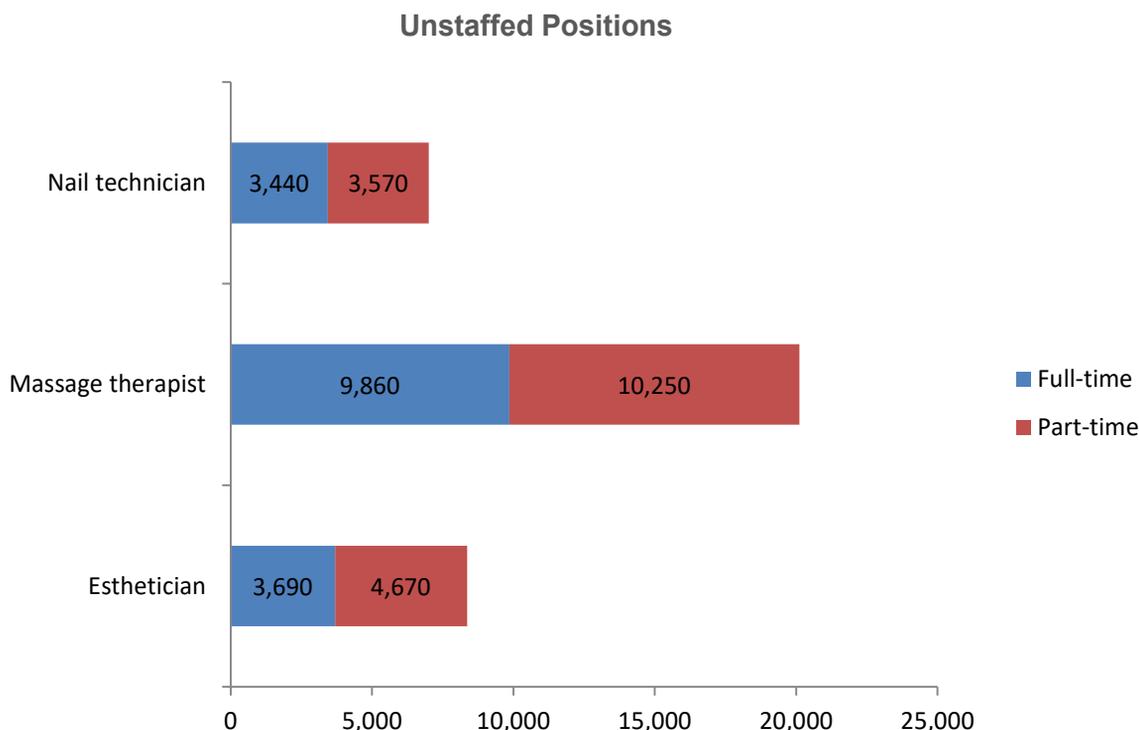
Massage therapists account for the largest number of unfilled positions that spas are currently trying to fill, a total of 20,110 representing over one in two unfilled service provider positions (57%).

Estheticians account for an estimated 8,360 unstaffed positions (24%).

The remaining 7,010 positions are for nail technicians (20%).

The number of unfilled service provider positions equates to 10% of total employment in the spa industry as of May 2018. It should be noted that unfilled positions arise both for new job openings and for other reasons (i.e., some unfilled positions will replace employees who have, for example, left for a job elsewhere).

Nonetheless, the level of vacancies points to a strong level of demand for people with the necessary skills and qualifications to work in spas as service providers.



Unstaffed Positions - Composition

		All	Day	Resort/Hotel	Other
Esthetician	Full-time	3,690	3,180	170	340
	Part-time	4,670	4,290	290	80
	All	8,360	7,470	460	420
Massage therapist	Full-time	9,860	8,340	600	910
	Part-time	10,250	8,290	1,570	390
	All	20,110	16,630	2,170	1,300
Nail technician	Full-time	3,440	3,050	340	60
	Part-time	3,570	2,770	750	50
	All	7,010	5,820	1,090	110
All service providers	Full-time	16,990	14,570	1,110	1,310
	Part-time	18,490	15,350	2,610	520
	All	35,480	29,920	3,720	1,830

Unstaffed Positions: Directors and managers

Spas saying that they have unstaffed positions were asked to also say how many spa director and spa manager positions they are actively trying to fill.

The total number of spa director positions that spas are currently seeking to fill is estimated at 530, predominantly on a full-time basis (480).

It is estimated that spas are seeking to fill 2,010 spa manager positions, of which 72% (1,450) are full-time with the rest being part-time posts.

Unstaffed Positions: Spa directors and managers

	Full-time	Part-time	All
Directors	480	50	530
Managers	1,450	560	2,010
All	1,930	610	2,540

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.

International SPA Association

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