



2019 ISPA U.S. SPA INDUSTRY STUDY

20th Anniversary Edition



Compensation Supplement

Introduction

This report presents the findings from the employee compensation and benefits section of the 2019 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 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 2019 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 \$87,900 compared to \$64,600 in the day spa sector.
- Amongst spas employing **managers** on a full-time basis, the average compensation level in resort/hotel spas was \$58,100. In day spas, the average was estimated at \$48,400.
- Amongst spas employing **estheticians** on a full-time basis, the average salary was estimated at \$44,100, ranging from \$41,700 in day spas to \$55,700 in resort/hotel spas.
- Amongst spas employing **massage therapists** on a full-time basis, the annual compensation level was \$42,900 across all spas. The average was higher in resort/hotel spas (\$56,700) compared to day spas (\$41,200).
- Amongst spas employing **nail technicians** on a full-time basis, the estimated average annual compensation level was \$35,400. Among resort/hotel spas, the estimated average was \$43,500 compared to \$33,100 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 (63% average for estheticians, 62% for massage therapists and 60% for nail technicians).
- **Straight commission on services** was mentioned by 28% of respondents in respect of massage therapists and a similar proportion (29%) for estheticians. At 40% of respondents, the proportion was higher for nail technicians.
- **Straight hourly pay** was quoted by 13% of spas in respect of both estheticians and massage therapists and 16% 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 83% in respect of massage therapists to 80% for both estheticians and 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 **31 hours** to be considered a full-time employee. Almost nine in 10 day spas (85%) gave a value in the range 28-32 hours. A large majority of resort/hotel spas (78%) also gave a figure in the range 28-32 hours. 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, **54%** of spas said they had openings that they are actively trying to fill, ranging from **63%** of resort/hotel spas, **55%** of day spas and **41%** of other spas.
- The number of unfilled service provider positions is estimated at **28,420** of which **14,110** are full time and **14,310** part-time.
- **Massage therapists** account for the largest number of unfilled positions that spas are currently trying to fill, a total of **17,310** representing 61% of unfilled positions.
- **Estheticians** account for an estimated **6,990** unstaffed positions (25%).
- The remaining **4,120** positions are for **nail technicians** (13%).
- 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 **990** with a further **3,320 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 2019 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 along with unfilled positions for spa directors and managers.

The methodology for implementing the survey is described in the main ISPA 2019 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.

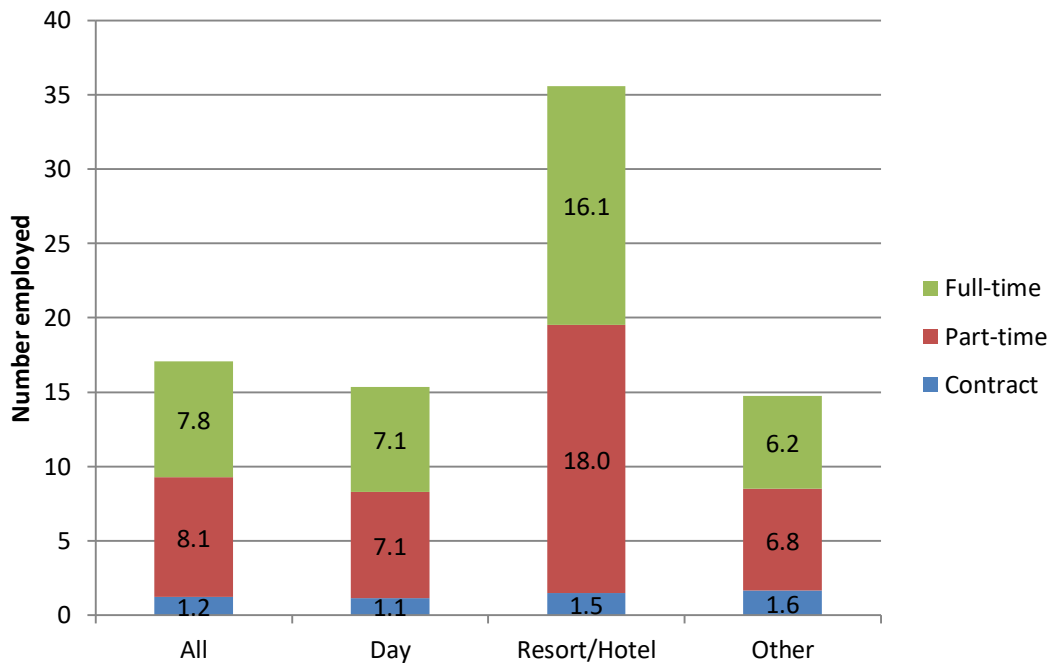
Employment

The total number employed in the spa industry is estimated at 377,900 as of May 2019, comprising 172,000 full-time employees, 178,500 part-time employees and 27,400 contract workers.

There are 22,160 spa locations across the U.S., with an average of 17.1 workers per spa establishment.

Employment levels are highest in resort/hotel spas, with 35.6 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 (79%) of all spa establishments and hence also the largest share of spa industry employment (71%).

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.

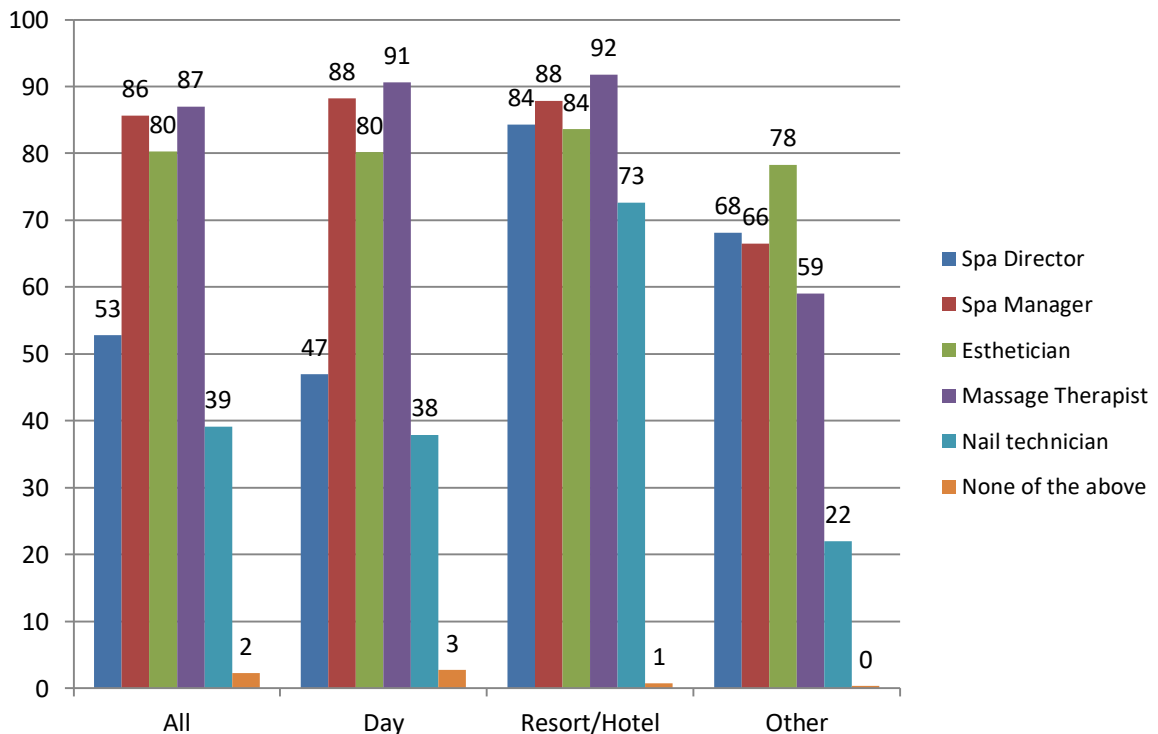
A large majority of resort/hotel spas (84%) said they employ a full-time spa director, compared with 47% of day spas.

Full-time spa managers are employed in 88% of resort/hotel spas. The same proportion of day spas employ a full-time manager.

The majority of spas employ full-time estheticians (80%) and massage therapists (87%). A little under four in 10 spas (39%) employ full-time nail technicians.

Only two percent of spas indicated that they have no full-time employees in management positions or providing services. These are almost all owner-run spas (96%), primarily in the day spa sector.

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 31 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.

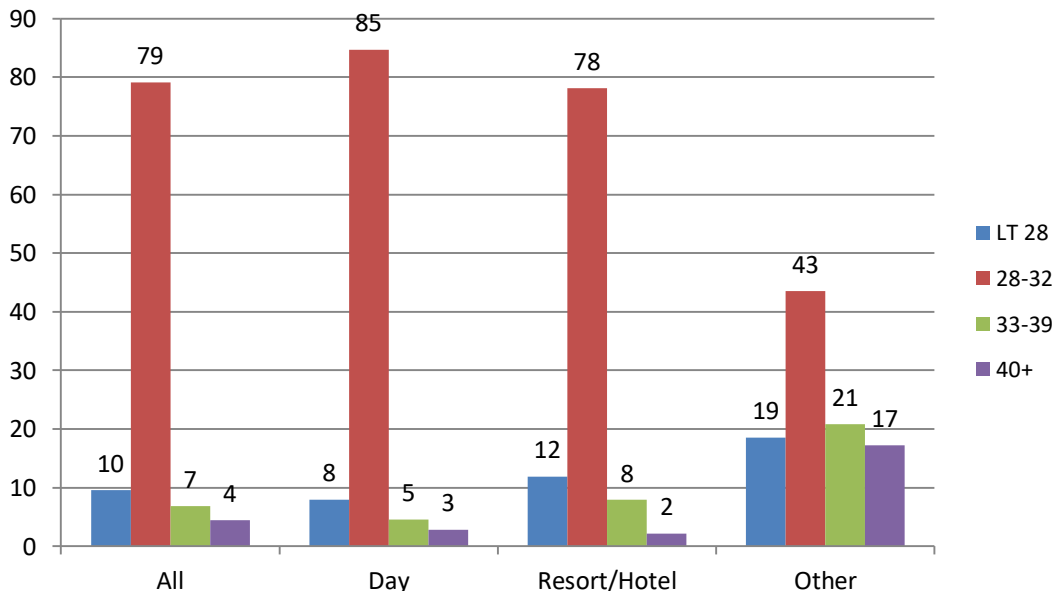
The average number of hours necessary for full-time status did not vary greatly by type of spa. Almost nine in 10 day spas (85%) gave a value in the range 28-32 hours. A large majority of resort/hotel spas (78%) also gave a figure in the range 28-32 hours.

Across all spa types, the most frequently reported minimum was 30 hours, quoted by 52% of day spas and 51% of resort/hotel spas.

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

| | All | Day | Resort/Hotel | Other |
|---------|-----|-----|--------------|-------|
| Average | 31 | 30 | 30 | 33 |

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



Average Annual Compensation

For the 2019 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 \$41,700 for estheticians to \$33,100 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 \$56,700 for massage therapists to \$43,500 for nail technicians.

The estimated average compensation level for spa managers is \$48,400 in day spas compared to \$58,100 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 \$87,900 in resort/hotel spas compared with \$64,600 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 set of slides in this report.

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

| | All | Day | Resort/Hotel |
|-------------------|----------|----------|--------------|
| Spa Directors | \$72,000 | \$64,600 | \$87,900 |
| Spa Managers | \$49,900 | \$48,400 | \$58,100 |
| Esthetician | \$44,100 | \$41,700 | \$55,700 |
| Massage therapist | \$42,900 | \$41,200 | \$56,700 |
| Nail technician | \$35,400 | \$33,100 | \$43,500 |

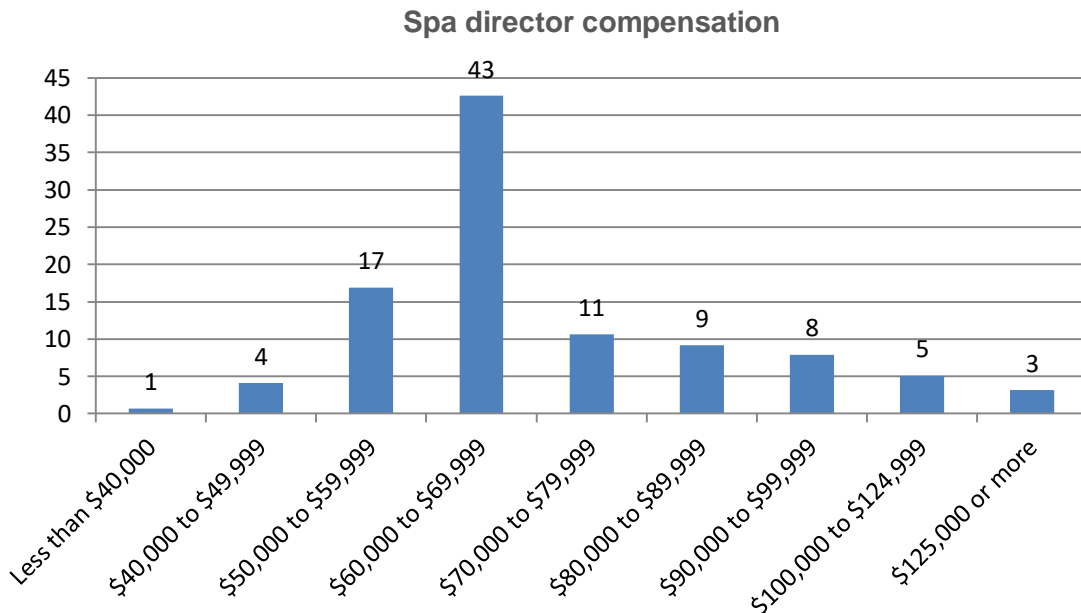
Note: Base = spas employing 1+ full-time employees.

Spa Director Compensation

Spa director compensation levels vary widely around the average of \$72,000. A little over four in 10 (43%) receive compensation in the range \$60,000 to \$69,999 with 36% earning \$70,000 or more and 22% earning under \$60,000.

In the day spa sector, where 47% of establishments employ a spa director, 57% said their annual compensation level for that position was in the range \$60,000 to \$69,999. A little over one in four (26%) quoted an annual compensation level under \$60,000 with the remaining 17% reporting a compensation level of \$70,000 and above.

By contrast, in the resort/hotel spa sector, where 84% said they employ a spa director, 70% said that their spa directors receive compensation in excess of \$80,000, including 20% earning \$100,000 or more. Almost one in four (23%) quoted a salary in the range \$60,000 to \$79,999. The proportion earning less than \$60,000 was 7%.



Average annual compensation (including gratuities), Spa Directors

| | All | Day | Resort/Hotel |
|---------------|----------|----------|--------------|
| Spa Directors | \$72,000 | \$64,600 | \$87,900 |

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% | 1% |
| \$40,000 to \$49,999 | 4% | 4% | 1% |
| \$50,000 to \$59,999 | 17% | 21% | 4% |
| \$60,000 to \$69,999 | 43% | 57% | 12% |
| \$70,000 to \$79,999 | 11% | 10% | 11% |
| \$80,000 to \$89,999 | 9% | 3% | 22% |
| \$90,000 to \$99,999 | 8% | 3% | 29% |
| \$100,000 to \$124,999 | 5% | 1% | 14% |
| \$125,000 or more | 3% | 0% | 6% |

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

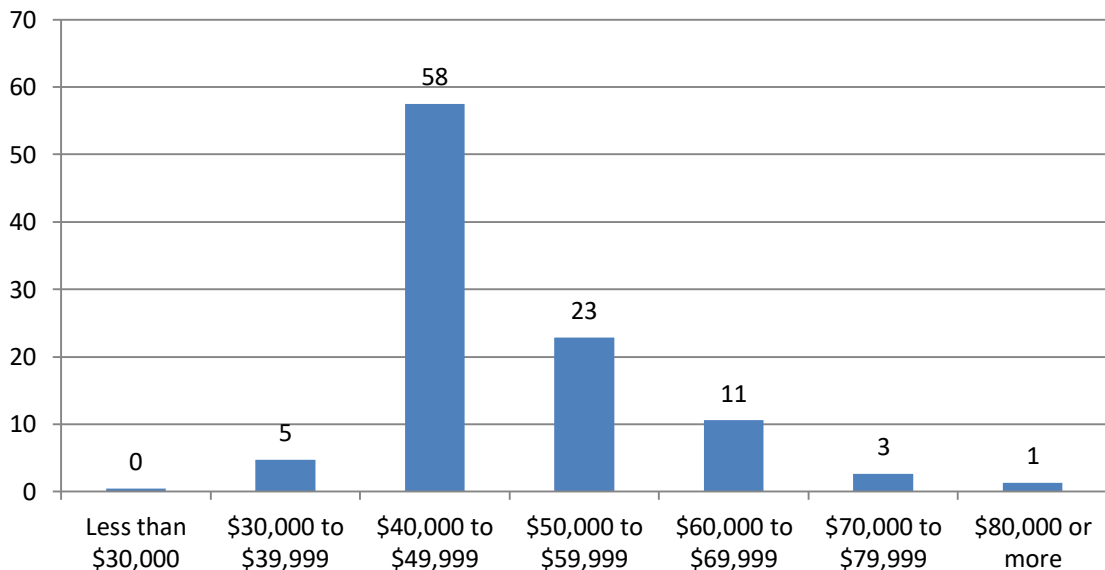
Spa Manager Compensation

Among spas employing managers on a full-time basis (86%), almost six in 10 (58%) said managers receive compensation in the range \$40,000 to \$49,999. A little over one in three (37%) quoted a salary of \$50,000 and above with the remaining 5% saying their managers receive less than \$40,000.

In the day spa sector, where 88% said they employ a full-time spa manager, almost two in three respondents (64%) quoted an average compensation level in the range \$40,000 to \$49,999. Almost one in three (31%) said their managers receive \$50,000 and above with the remaining 4% reporting a compensation level of less than \$40,000.

In the resort/hotel sector, where 88% of spas employ a manager, one in three respondents (34%) said their managers receive compensation in the range \$60,000 to \$69,999. The proportion of resort/hotel spas reporting a compensation level below \$60,000 was 48% with the remaining 18% saying their managers receive \$70,000 and above.

Spa manager compensation



Average annual compensation (including gratuities), Spa Managers

| | All | Day | Resort/Hotel |
|--------------|----------|----------|--------------|
| Spa Managers | \$49,900 | \$48,400 | \$58,100 |

Spa Manager Compensation by Type of Spa

Annual compensation, full-time employees

| | All | Day | Resort/Hotel |
|----------------------|-----|-----|--------------|
| Less than \$30,000 | 0% | 0% | 2% |
| \$30,000 to \$39,999 | 5% | 4% | 7% |
| \$40,000 to \$49,999 | 58% | 64% | 12% |
| \$50,000 to \$59,999 | 23% | 22% | 26% |
| \$60,000 to \$69,999 | 11% | 8% | 34% |
| \$70,000 to \$79,999 | 3% | 1% | 15% |
| \$80,000 or more | 1% | 0% | 3% |

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

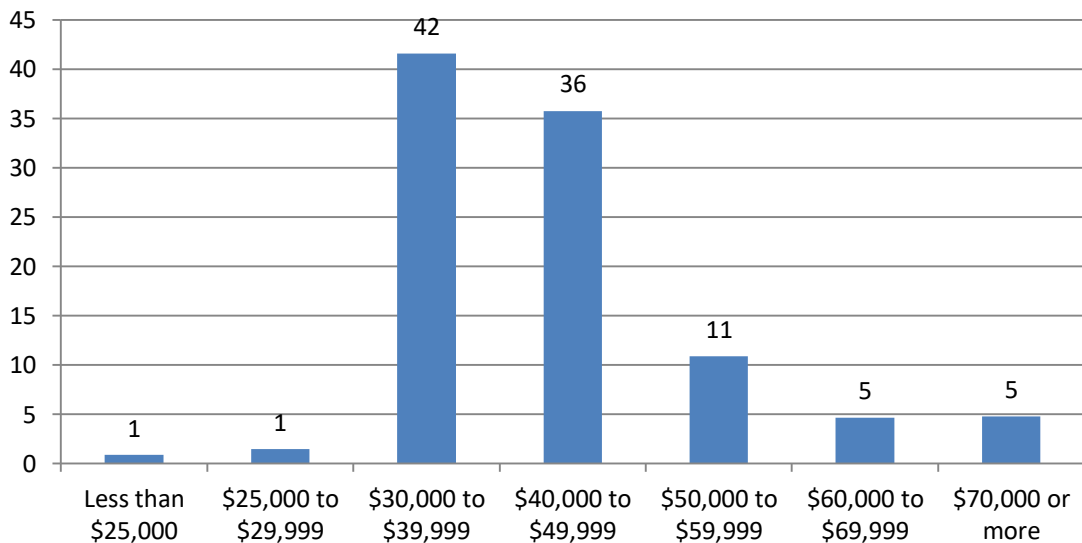
Esthetician Compensation

Amongst spas employing estheticians on a full-time basis (80%), average annual compensation was \$44,100, with 36% of spas quoting a compensation level in the range \$40,000 to \$49,999. One in five spas (20%) said their estheticians receive \$50,000 or more with 44% reporting a figure of less than \$40,000.

In the day spa sector, where 80% said they employ one or more full-time estheticians, average annual compensation was \$41,700, with 37% of spas quoting a compensation level in the range \$40,000 to \$49,999. One in two day spas (51%) gave an annual compensation level less than \$40,000 while 12% said their estheticians earn \$50,000 or more.

In the resort/hotel spa sector, where 84% said they employ one or more full-time estheticians, average annual compensation was \$55,700, with 28% of spas quoting a compensation level in the range \$50,000 to \$59,999. Almost one in three (30%) reported an annual compensation level of \$60,000 or more with the remaining 42% citing less than \$50,000.

Esthetician compensation



Average annual compensation (including gratuities), Estheticians

| | All | Day | Resort/Hotel |
|-------------|----------|----------|--------------|
| Esthetician | \$44,100 | \$41,700 | \$55,700 |

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% | 1% |
| \$25,000 to \$29,999 | 1% | 1% | 2% |
| \$30,000 to \$39,999 | 42% | 49% | 9% |
| \$40,000 to \$49,999 | 36% | 37% | 30% |
| \$50,000 to \$59,999 | 11% | 7% | 28% |
| \$60,000 to \$69,999 | 5% | 3% | 11% |
| \$70,000 or more | 5% | 2% | 20% |

Note: Base = spas with full-time estheticians.

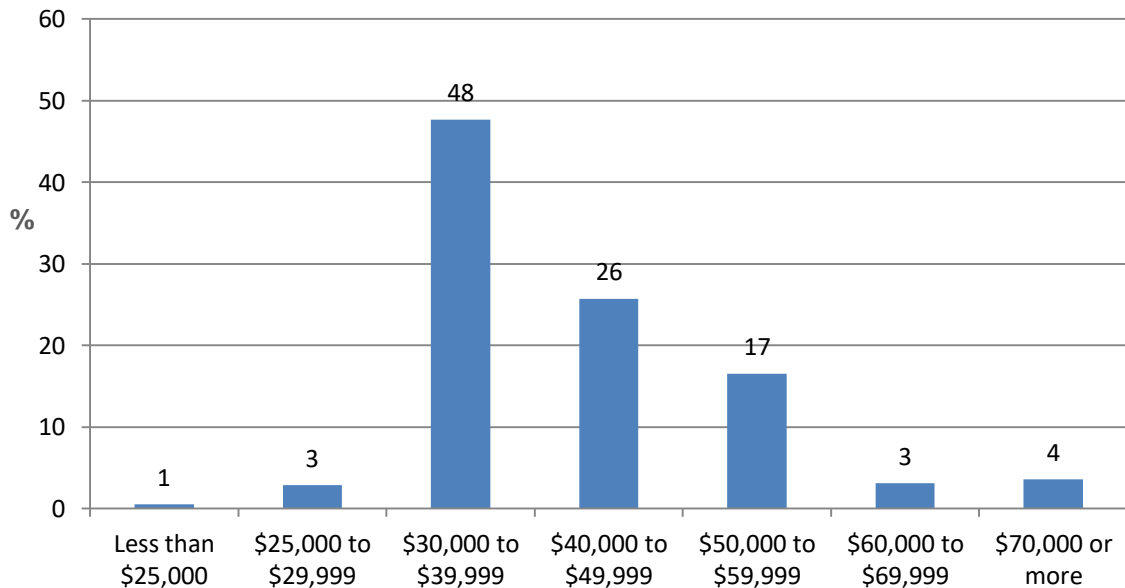
Massage Therapist Compensation

Amongst spas employing massage therapists on a full-time basis (87%), the average annual compensation level quoted was \$42,900. A little over one in four spas (26%) said their massage therapists earn \$40,000 to \$49,999 annually with a similar proportion (24%) quoting a salary level of \$50,000 and above. Almost one in two (48%) said annual earnings are in the range \$30,000 to \$39,999.

In the day spa sector, where 91% said they employ one or more full-time massage therapists, \$30,000 to \$39,999 was the most frequently cited compensation level (54%). Just under one in four (23%) said compensation levels are in the range \$40,000 to \$49,999 with 19% quoting a figure of \$50,000 and above.

In the resort/hotel spa sector, where 92% said they employ one or more full-time massage therapists, 63% of respondents said that compensation levels are in the range \$50,000 and above. Over one in four (27%) said compensation levels are between \$40,000 to \$49,999 with the remaining 10% saying compensation levels are under \$40,000.

Massage therapist compensation



Average annual compensation (including gratuities), Massage therapists

| | All | Day | Resort/Hotel |
|-------------------|----------|----------|--------------|
| Massage therapist | \$42,900 | \$41,200 | \$56,700 |

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 | 1 | 1 | 1 |
| \$25,000 to \$29,999 | 3 | 3 | 0 |
| \$30,000 to \$39,999 | 48 | 54 | 9 |
| \$40,000 to \$49,999 | 26 | 23 | 27 |
| \$50,000 to \$59,999 | 17 | 16 | 28 |
| \$60,000 to \$69,999 | 3 | 2 | 12 |
| \$70,000 or more | 4 | 1 | 22 |

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

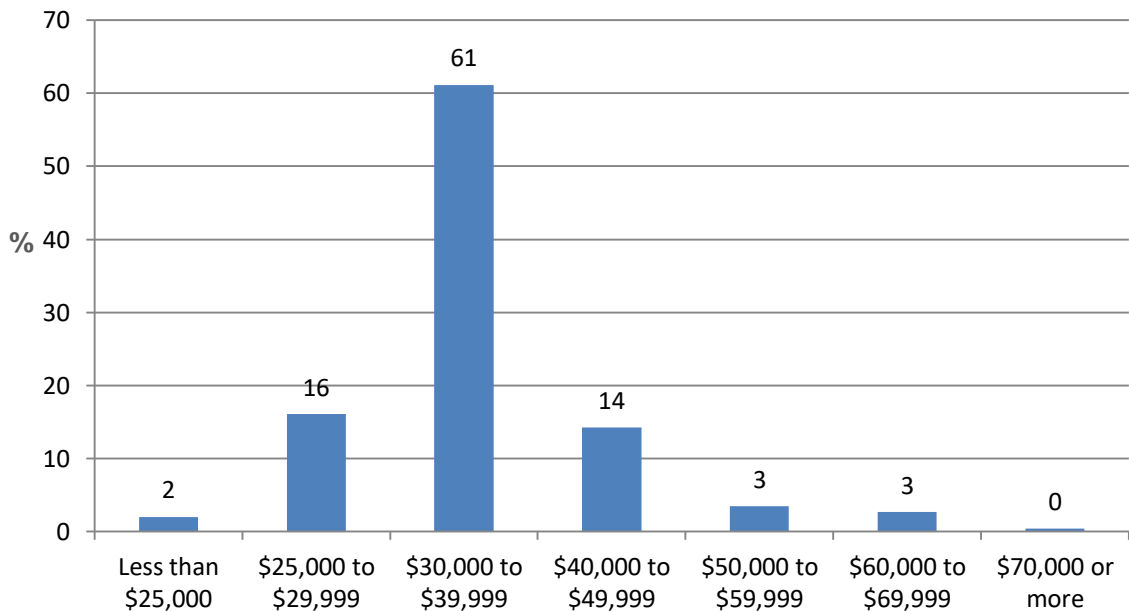
Nail Technician Compensation

Amongst spas employing nail technicians on a full-time basis (39%), the average annual compensation level quoted was \$35,400, with 61% of spas reporting earnings in the range \$30,000 to \$39,999. One in five spas (20%) reported average annual compensation of \$40,000 or more. A similar proportion (18%) said their nail technicians earn under \$30,000.

In the day spa sector, where 38% said they employ one or more full-time technicians, 72% said compensation levels are in the range \$30,000 to \$39,999. One in five (20%) quoted an amount less than \$30,000 with the remaining 9% giving a figure of \$40,000 and above.

In the resort/hotel spa sector, where 73% said they employ one or more full-time nail technicians, almost one in two spas (45%) reported an annual compensation amount in the range \$40,000 to \$49,999. Almost one in four (24%) reported a figure of \$50,000. The remaining 32% gave a figure less than \$40,000.

Nail technician compensation



Average annual compensation (including gratuities), Nail technicians

| | All | Day | Resort/Hotel |
|-----------------|----------|----------|--------------|
| Nail technician | \$35,400 | \$33,100 | \$43,500 |

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 | 2 | 2 | 3 |
| \$25,000 to \$29,000 | 16 | 18 | 9 |
| \$30,000 to \$39,000 | 61 | 72 | 20 |
| \$40,000 to \$49,999 | 14 | 8 | 45 |
| \$50,000 to \$59,999 | 3 | 1 | 5 |
| \$60,000 to \$69,999 | 3 | 0 | 16 |
| \$70,000 or more | 0 | 0 | 3 |

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

Compensation Structures for Service Provider Employees

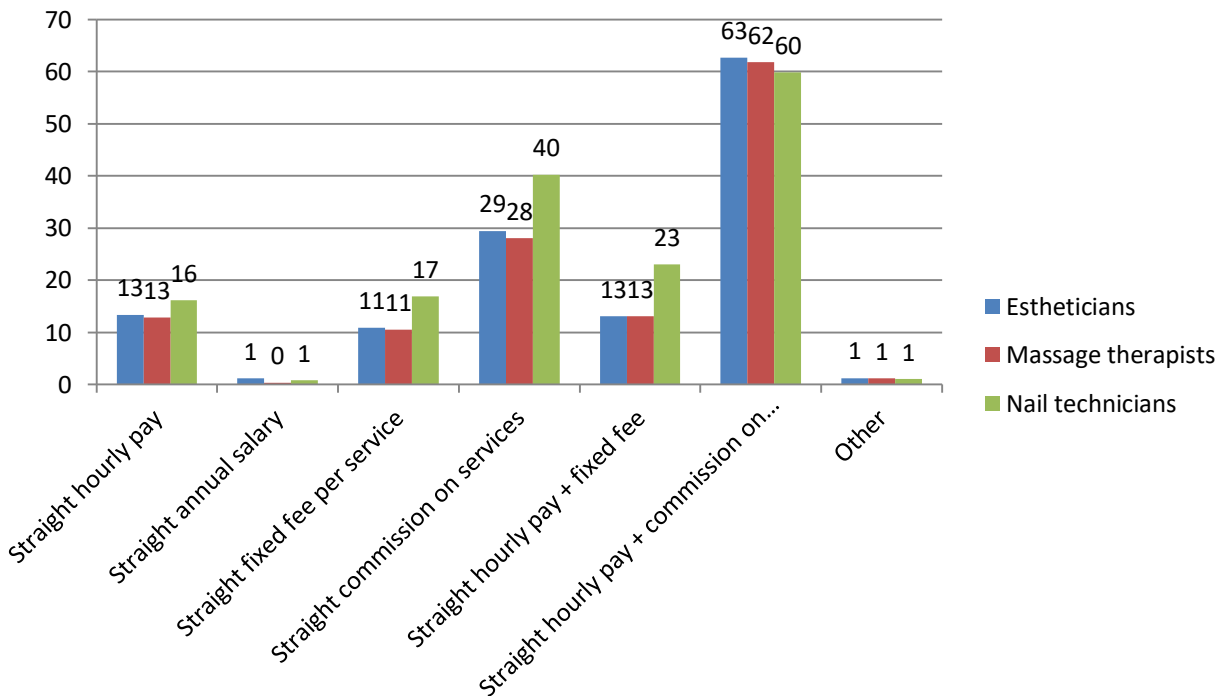
Compensation structures tend not to vary greatly by type of service provider. For each type of service provider, straight hourly pay plus commission on services was the most frequently mentioned structure, followed by straight commission of services and straight hourly pay.

The two slides following 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 (63%) and massage therapists (63%).

In the resort/hotel sector, straight hourly pay plus commission on services was also 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 | 13% | 15% | 2% |
| Straight annual salary | 1% | 1% | 1% |
| Straight fixed fee per service | 11% | 11% | 18% |
| Straight commission on services | 29% | 32% | 29% |
| Straight hourly pay + fixed fee | 13% | 12% | 23% |
| Straight hourly pay + commission on services | 63% | 63% | 67% |
| Other | 1% | 1% | 0% |

Compensation Structures for Service Provider Employees: Massage Therapists

| | All | Day | Resort/Hotel |
|--|-----|-----|--------------|
| Straight hourly pay | 13% | 14% | 2% |
| Straight annual salary | 0% | 0% | 1% |
| Straight fixed fee per service | 11% | 10% | 17% |
| Straight commission on services | 28% | 29% | 32% |
| Straight hourly pay + fixed fee | 13% | 12% | 22% |
| Straight hourly pay + commission on services | 62% | 63% | 62% |
| Other | 1% | 1% | 0% |

Compensation Structures for Service Provider Employees: Nail Technicians

| | All | Day | Resort/Hotel |
|--|-----|-----|--------------|
| Straight hourly pay | 16% | 20% | 3% |
| Straight annual salary | 1% | 1% | 2% |
| Straight fixed fee per service | 17% | 18% | 19% |
| Straight commission on services | 40% | 45% | 27% |
| Straight hourly pay + fixed fee | 23% | 22% | 23% |
| Straight hourly pay + commission on services | 60% | 60% | 72% |
| Other | 1% | 0% | 0% |

For each type of service provider, respondents were asked to select all compensation structures that they use. Therefore, the proportions shown in each of the three tables above may add to more than 100%.

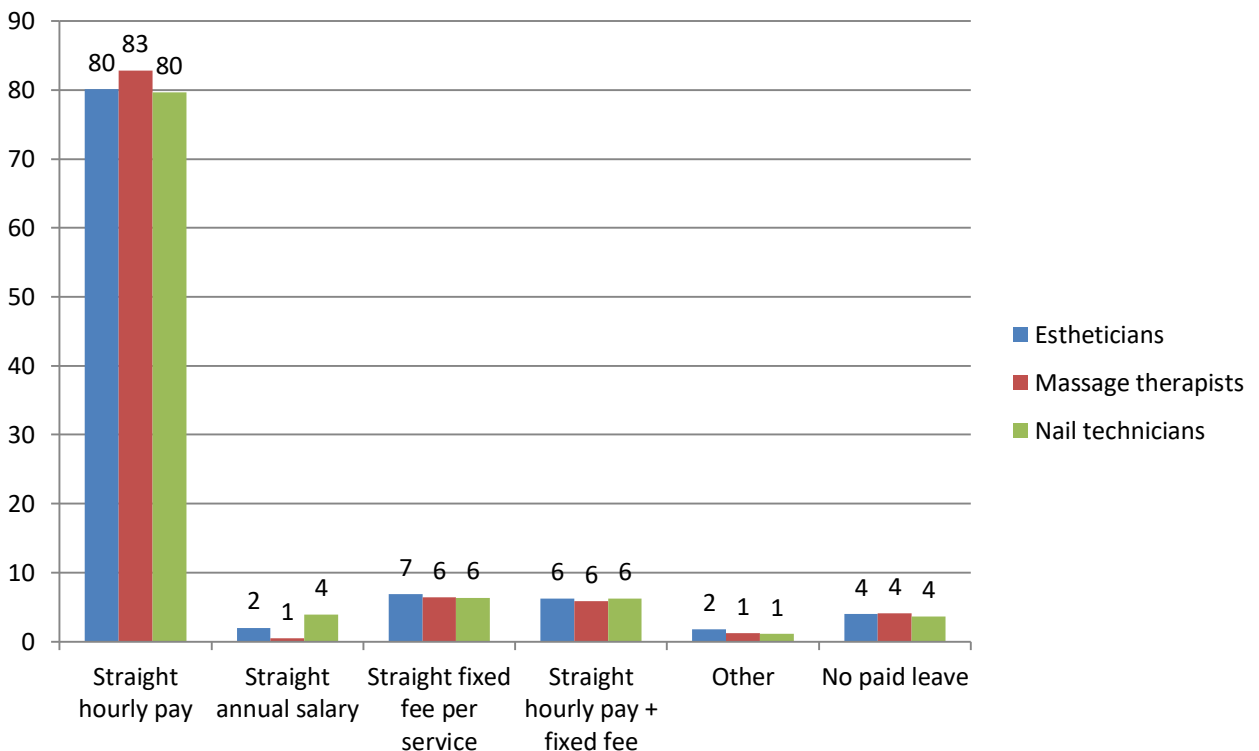
Compensation Structures for Service Provider Employees : Paid Time Off

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, within a narrow range from 83% for massage therapists to 80% for estheticians and nail technicians.

The use of straight hourly pay as a compensation structure for paid time off varied only slightly by type of spa. Day spas were slightly more likely to say they use straight hourly pay, mentioned by 82% to 86% across the service provider categories. Among resort/hotel spas, 77% said they use straight hourly pay across each of the three service provider categories.

Very few spas make no provision for paid time off; 4% across the service provider types.

Compensation structures – service provider employees: Paid time off



Unstaffed Positions: Service Providers

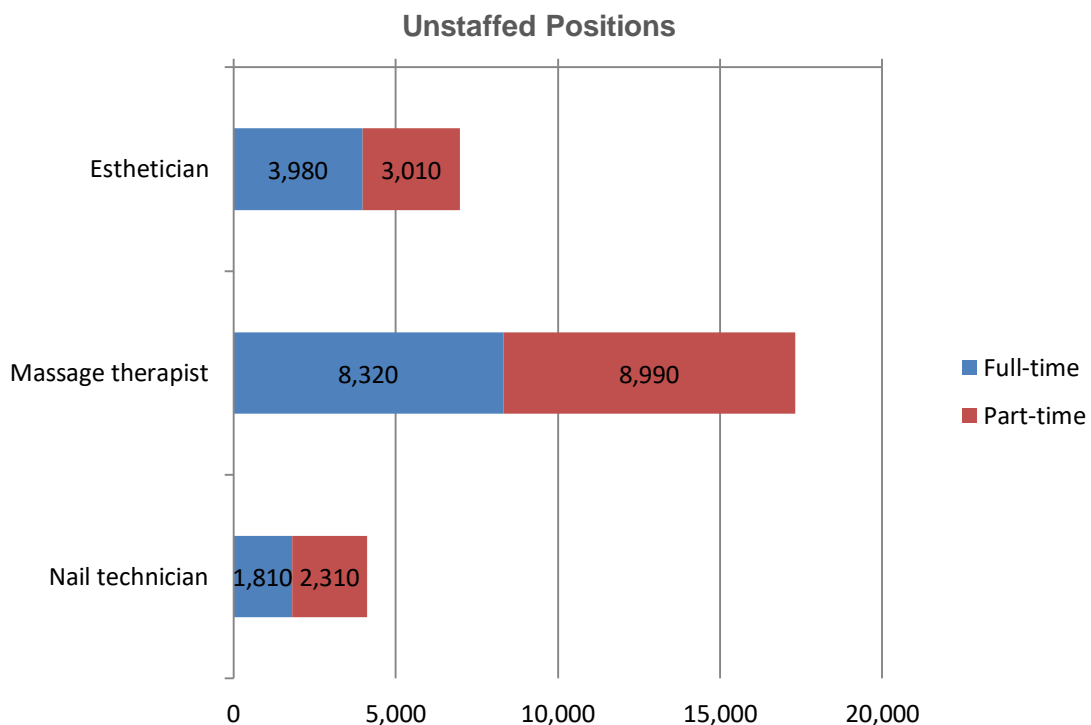
When asked if they have any unstaffed service provider positions, 54% of spas said they had openings that they are actively trying to fill, ranging from 63% of resort/hotel spas, 55% of day spas and 41% of other spas. The number of unfilled service provider positions is estimated at 28,420 of which 14,110 are full time and 14,310 part-time.

Massage therapists account for the largest number of unfilled positions that spas are currently trying to fill, a total of 17,310 representing 61% of unfilled service provider positions. The proportion did not vary greatly between day spas (62%) and resort/hotel spas (60%).

Estheticians account for an estimated 6,990 unstaffed positions (25%). The esthetician share of service provider vacancies was higher among day spas (25%) compared to resort/hotel spas (17%).

The remaining 4,120 positions are for nail technicians (14%). The esthetician share of service provider vacancies was higher among resort/hotel spas (23%) compared to day spas (13%).

The number of unfilled service provider positions equates to 8% of total employment in the spa industry as of May 2019. 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).



Unstaffed Positions - Composition

| | | All | Day | Resort/Hotel | Other |
|------------------------------|------------|---------------|---------------|--------------|--------------|
| Esthetician | Full-time | 3,980 | 3,260 | 340 | 380 |
| | Part-time | 3,010 | 2,270 | 370 | 380 |
| | All | 6,990 | 5,530 | 710 | 760 |
| Massage Therapist | Full-time | 8,320 | 6,620 | 950 | 750 |
| | Part-time | 8,990 | 6,890 | 1,610 | 490 |
| | All | 17,310 | 13,510 | 2,560 | 1,240 |
| Nail Technician | Full-time | 1,810 | 1,360 | 320 | 130 |
| | Part-time | 2,310 | 1,400 | 670 | 240 |
| | All | 4,120 | 2,760 | 990 | 370 |
| All Service Providers | Full-time | 14,110 | 11,240 | 1,610 | 1,260 |
| | Part-time | 14,310 | 10,560 | 2,650 | 1,110 |
| | All | 28,420 | 21,800 | 4,260 | 2,370 |

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 990, of which 620 (63%) are full-time and 370 (37%) are part-time positions.

It is estimated that spas are seeking to fill 3,320 spa manager positions, of which 1,930 (58%) are full-time with the remaining 1,390 (42%) part-time openings.

Unstaffed Positions: Spa Directors and Managers

| | Full-time | Part-time | All |
|------------|------------------|------------------|--------------|
| Directors | 620 | 370 | 990 |
| Managers | 1,930 | 1,390 | 3,320 |
| All | 2,550 | 1,760 | 4,310 |

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.

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International Survey Unit

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