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U.S. Resort Spa Offerings: A State of the Industry Report

Mary Wisnom
Florida Gulf Coast University, mwisnom@bgsu.edu

INTRODUCTION

The purpose of this state-of-the-industry report is to provide a comprehensive overview of resort spa menu offerings in the United States. The findings will provide a benchmark to help industry professionals compare resort spa menu offerings and provide stakeholders with facts and possible inspiration regarding the variety of resort spa offerings available in the United States. To set the stage, the report starts with an overview of the spa industry, data about recent growth in both the global and U.S. markets, and a summary of U.S. resort spas. General findings related to spa offerings and the resort spa menu are shared before launching into the most current data on U.S. resort spa offerings.

Spa Industry Size and Growth

The spa industry has achieved staggering growth over recent years, both globally and in the United States. In 2016, the global wellness economy reached an estimated $3.72 trillion in revenues and grew by 10.6% from 2014 – 2015, making it one of the world's fastest-growing markets (Global Wellness Institute, 2017). According to the Global Spa Institute (GWI, 2017), the global wellness economy includes 'industries that enable consumers to incorporate wellness activities and lifestyles into their daily lives.' These industries include sectors such as the spa industry, wellness tourism, thermal/mineral springs, beauty and anti-aging, fitness and mind-body, spa education, and complementary and alternative medicine. In 2015, spa facilities numbering 121,595 globally, reached $78 billion in revenues. (GWI, 2017).

In 2015, the U.S. accounted for approximately one quarter of all spa facility revenues (GWI, 2017). According to the International Spa Association (ISPA, 2017), U.S. spa facilities saw 184 million spa visits, resulting in total revenue of $16.8 billion dollars. In 2015, there were 21,020 U.S. spa locations, most common being day spas (79.5%) followed by resort/hotel spas (8.6%) (ISPA, 2016a).

In 2002, the International Spa Association revealed the first hard data on the number of resort/hotel (resort) spa facilities in the United States. Since that time, the number of resort/hotel spa facilities has grown from 1150 to 1800 in 2015 (ISPA, 2002; ISPA, 2016a). Regardless of the incredible growth and size of the resort spa market, there are very few studies to help increase our understanding of this promising industry. In the past, spas were considered luxury, but as knowledge increases, spa-going is becoming a desirable and common way to enhance one's overall wellness (Mak, Wong, & Chang, 2009; Monteson & Singer, 2002).

Spas and Spa Offerings

The most widely used definition of spa in the United States is 'Spas are places devoted to enhancing overall well-being through a variety of professional services that encourage the renewal of mind, body and spirit' (ISPA, 2006). Using this definition, we know that: (1) Spas are ‘places,’ facilities, locations, businesses, (2) They have a foundational impetus to ‘enhance the overall well-being’ of the customer, guest, patient, client, (3) Spas reach this wellness goal by providing a ‘variety of professional services,’ primarily provided by licensed industry professionals, and (4) The services offered aim to ‘encourage the renewal of (the) mind, body and spirit.’ Reflecting on this definition, we can surmise that it is the services that are at the heart of a spa operation.

If spas want to remain competitive and successful, they must cater to the particular needs of the spa customer. The needs of a spa customer come in many forms. Customer needs may reflect a certain spa service, the attributes of that service, or the benefits the customer seeks from the experience. A primary deterrent to the spa customer is the absence of the particular service they seek. If the needs of the customers are fulfilled, they are more likely to visit a spa. It has been noted that a growing number of people are demanding spa experiences, particularly while traveling (Tabacchi, 2010). A few research publications have included the relationship of spa offerings and customer motivations (Alen et. al, 2006; Lo et al., 2013; Świeca, 2015; Vildová, 2015). These studies have varied widely and results have been mixed. One 2014 study reported that the majority (52%) of U.S. hotel patrons identified ‘the availability of spa/beauty services’ as either extremely or very important to their selection of a hotel (Mintel, 2014). There are a handful of companies that track spa, salon, wellness, and beauty industry purchases and products, such as International Spa Association, Mintel Group, Global Cosmetic Industry, and Research and Markets.

Several authors have sought to identify a list of offerings that are commonly provided in spas. Some focused on alternative therapies (Cook, 1999; NCCAM, 2012), some on Asian offerings (Wu, 2013). Leavy et al. (2003) concentrated on wellness services and Miller (1996) on beauty. Świeca (2015) studied spa offerings in Poland. Each study examined a specific segment of spa services, however, there has yet to be a research project that takes a comprehensive look at what U.S. resort spas offer on their menus. With the growth of the industry, spa patrons not only have more offerings than ever before, but there are also more establishments providing the services they desire.

Spa Menus

As the industry expands and the spa-goer becomes savvier, it is important to know the range and regularity of spa menu offerings. According to a 2015 ISPA member study, day spa menus included an average of 36 different treatments. Resort spa have been shown to offer the largest number and widest range of spa services and treatments with an average of 42 different treatments (ISPA, 2015c). The majority (78%) of spa menus exceed 5 pages in length, with 37% of menus exceeding 11 pages (ISPA, 2013c).

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Spa menus are a dynamic and essential tool for spas. Spa menus often change to suit the needs of customer and the spa. A 2013 ISPA member study, revealed the frequency of changes to spa menu offerings. Five percent (5%) of spas changed their menus monthly, 13% quarterly, 14% twice yearly and 44% annually (ISPA, 2013c). In a 2015 industry report, when spa managers were asked their future plans for 2016, 81% indicated they would be adding new treatment offerings, 61% would be introducing new product lines, and 58% would be launching a completely new spa menu (ISPA, 2016a).

Some spa menus include offerings for specific populations. A 2016 industry study reported of spa menus include treatments for couples (68%), treatments specifically for males (69%), specifically for females (69%), teen (13-19 year olds) treatments (44%) and youth treatments (14%) for those under the age of 13 years (ISPA, 2016a). In an effort to better comprehend spa operations and to benchmark spa practices, it is useful to continue to gain an understanding of spa menu offerings. Compared to other types of spas, resort spas have been shown to contain the most variety of offerings. For this study, resort spa offerings will be the focus.

This report will showcase industry research findings that has been consolidated and condensed to provide a comprehensive overview of resort spa menu offerings in the United States. All data is presented to provide a detailed state-of-the-industry report. The results of this study will assist industry professionals in comparing their menu offerings to other resort spas, provide resort spa owners, operators, and developers a closer look at the broad range of resort spa offerings, and assist suppliers in generating ideas for future services.

METHODS

The U.S. Resort Spa Offerings: A State of the Industry Report is a descriptive research project designed to provide data on the state of U.S. resort spa offerings. The published and unpublished secondary data shared in this report originates from research projects either completed by the International Spa Association (ISPA) or projects contracted for ISPA.

Two methods were employed to address the study's objective. First, ISPA has been distributing annual U.S. spa industry reports since 2002. In 2004, they began collecting data on resort spa offerings. The studies were completed by two independently contracted companies. Association Resource Centre, Inc. provided the 2004 and 2007 reports. Price Waterhouse Coopers LLP. provided the 2010 – 2013, 2015 & 2016 reports. Data was collected using primarily online surveys, however early reports utilized both telephone and online survey methods. Published data sets of the ISPA Spa Industry Reports were collected, analyzed, and appropriate data extracted. See Table 1 for general details of the projects. Sample size ranged from 497-970 resort spas, margins of error ranged from ±6.7% to ±7.2%.

Table 1: International Spa Association Industry Research

Year	**Collection Method(s)**	**N**	**Margin of Error**
2004	Telephone and Online Surveys	970	± 3.02**
2007	Telephone and Online Surveys	704	± 3.57**
2010	Online Surveys	732	±7.2%*
2011	Online Surveys	689	±6.7%* ±4.1%**
2012	Online Surveys	614	±6.8%*
2013	Online Surveys	497	±7.2%*
2015	Online Surveys	560	±6.7%*
2016	Online Surveys	531	±6.7%*

*Included in research publication for resort/hotel spas.

**Margin of error for all spa data (hydrotherapy and fitness/sports). 2004 & 2007 resort spa margins of error unavailable.

From the annual spa industry reports the following data was extracted: (1) 10 core categories of services offered, and (2) Offering details in the categories of hydrotherapy, fitness/sports and medically supervised services. Hydrotherapy details were contained in the 'spa facilities' section of report. Specific fitness/sports and medically supervised offerings data was not segmented by type of spa, therefore, no resort spa information could be mined. As this information was seen as important for a state-of-the-industry report, data on these two core categories will be reported for all spas.

The second method utilized for this report was extracting ISPA member survey data. In 2011, the association implemented a monthly member survey program. Every month an online 'Snapshot Survey' is sent to ISPA's approximately 4000 members. Members have an 8-day window to complete the survey. If completed, each respondent would have immediate access to the results report when published the following month. Five (5) member surveys between 2013 and 2016 featured spa offering questions. Each question asked participants to select from a comprehensive list, the services they currently offer their spa customer. Each spa offering question focused on one of the core categories. To help ensure the offering selections were complete, for the 2016 member studies, this report's author helped create the lists by extracting items first from ISPA's spa glossary (ISPA, 2015b), then extending the lists after evaluating further spa industry writings. Details of the five surveys and four published reports can be found in Table 2. Average resort spa sample size for the member survey data was 119. Data from one of the reports has yet to be published.

Table 2: International Spa Association Member Research

Year	Collection Method	N	Margin of Error	Published	Report Title
2016	Online Surveys	71	±11.4	No	NA
2016	Online Surveys	119	±8.68	Yes	Spa Treatments
2015	Online Surveys	80	±10.71	Yes	Spa Treatment Trends
2013	Online Surveys	127	±8.38	Yes	Spa Menu Engineering
2013	Online Surveys	160	±7.39	Yes	Wellness

There are two different methodologies used for each of the two groups of data. It is also important for the reader to understand how ISPA defines two key research terms. In order to be included in the study sample, spa "businesses must offer at least two of the following three services: massage, skin care, body treatments (hydrotherapy or body wraps/scrubs)." Therefore, the data for this report will not contain data from resort spas that offer less. For example, if a resort has a beauty salon with nail and hair services and facials, that resort would be excluded from the report. Also, when segmenting the spa industry, ISPA includes mineral spring spas with accommodations and destination spas in a different category than resort/hotel spas. So the data does not include these type of spas.

RESULTS

The report results are organized into two primary sections, (1) findings for the 10 common spa offering 'core' categories and (2) more in depth data for each core category. For example, the first section includes participation data and trends on the core category "hydrotherapy" and the second section includes participation findings on an individual hydrotherapy services, such as "baths."

Resort Spa Offering Core Categories

All resort spa offerings generally fit into broader core categories. Since 2010, ISPA has utilized the following 10 core categories: (1) massage services, (2) facial skin care services, (3) body skin care services, (4) salon services, (5) fitness or sports offerings, (6) mind, body and spirit, (7) hydrotherapy, (8) complementary therapies, (9) wellness programs and (10) medically supervised services. In 2016, resort spas offered a service or services from an average of 6.1 different core categories (ISPA, 2016a). All resort spas offered massage, skin care and body services in 2016. Salon services were offered by 90% of all resort spas, followed by fitness or sports activities (62%), mind, body and spirit (56%), hydrotherapy (47%), complementary therapies (29%), wellness programs (13%) and medically supervised services (11%). (See Table 3.)

Table 3: Percent of Resort Spas Offering Core Category Services in 2016

Core Category	**Percent**
Massage Services	100%
Facial Skin Care Services	100%
Body Skin Care Services	100%
Salon Services	90%
Fitness or Sports Offerings	62%
Mind, Body, and Spirit	56%
Hydrotherapy	47%
Complementary Therapies	29%
Wellness Programs	13%
Medically Supervised Services	11%

Core category spa offerings data has been collected through ISPA's industry studies for the last several years. Massage and skin care (called 'facials' in 2007) data dates back to 2004. With a few exceptions, the remaining core categories have been monitored since 2010. Massage, facial and body skin care services have remained relatively stable over the years with nearly all resort spas offering service(s) in these categories. Salon services have seen steady and noteworthy growth increasing from 78% in 2010 to 90% in 2016. Approximately half resort spas have offered fitness/sports, mind/body and hydrotherapy since 2010. Complementary therapies have been fairly stable over the years with about one-third of resort spas providing service(s). Wellness programs were not researched in 2013, however, fell from 25% in 2012 to 7% in 2015, bouncing back to 13% in 2016. Medically supervised services grew from 3% in 2013 to 11% in 2016. (See Figure 1.)

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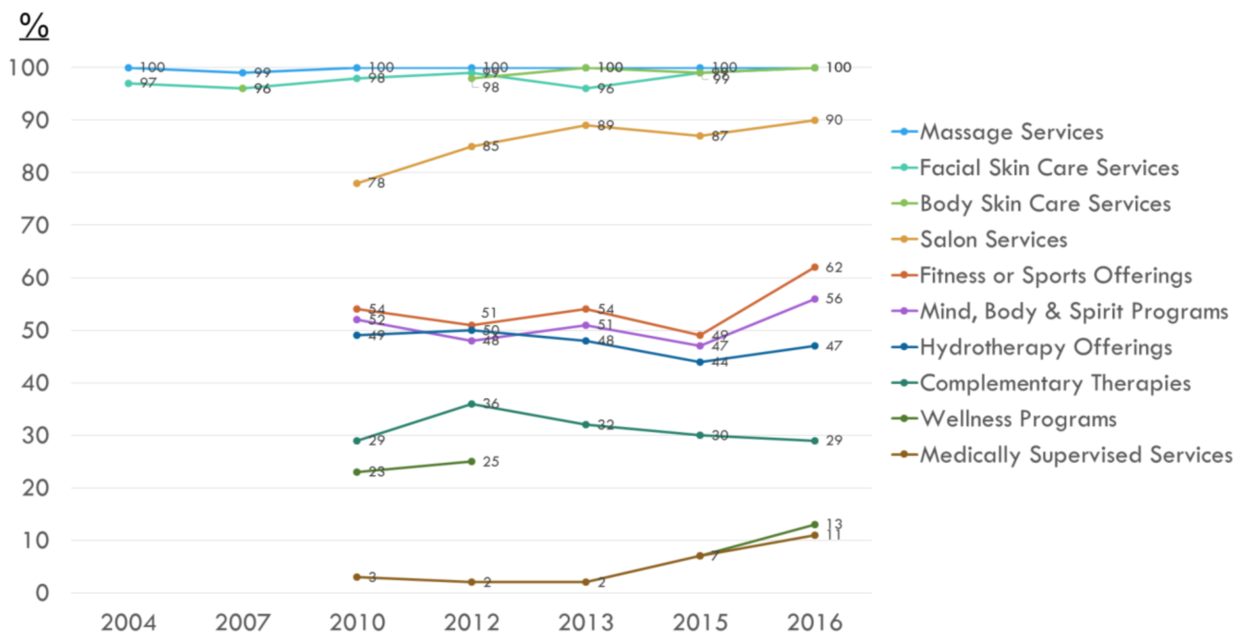
Figure 1: Percent of Resort Spas Offering Core Category Services 2004 to 2016



Resort Spa Offerings by Core Category

Massage services are hands on manipulative body treatments offered by licensed massage therapists. All resort spas offer massage services (ISPA, 2016a). Thirty-three different massages were offered. The most common massages found on resort spa menus include Swedish (98%), pregnancy massage (98%), deep tissue massage (97%), stone massage (91%), reflexology (84%), and sports massage (84%). Approximately half of resort spas offer the Asian inspired services of Thai and shiatsu massage. Less common services such as gua-sha, mariel, dagdagay (kol-kolis), jamu, laying-on-the-hands, udvartana, vibratory (pneumotherapy) massage, chi nei tsang, chiropractic and faradism are available in less than 5% of all resort spas. See table 4 for details (ISPA, 2016b).

Table 4: Percent of Resort Spa Massage Service Offerings in 2016

Massage Service	**Percent**
Swedish Massage	98%
Pregnancy Massage	98%
Deep Tissue	97%
Stone Massage	91%
Reflexology	84%
Sports Massage	84%

Thai Massage	50%
Shiatsu Massage	44%
Lymphatic Drainage Massage	39%
Therapeutic Touch	32%
Cranial Sacral Therapy	29%
Lomi Lomi	27%
Myofacial Release	24%
Accupressure	21%
Structural Integration/Rolfing	9%
Abhyanga	8%
Ashiatsu	8%
Infant Massage	8%
Tui Na (Tuina)	7%
Hellerwork	6%
Polarity Therapy	6%
Esalen Massage	5%
Ohashiatsu	5%
Gua-Sha	4%
Mariel	4%
Dagdagay (Kol-Kolis)	2%
Jamu	2%
Laying-On-The-Hands	2%
Udvartana	2%
Vibratory Massage	2%
Chi Nei Tsang	1%
Chiropractic	1%
Faradism	1%

Skin care services are facial treatments offered by licensed skin care specialists, such as estheticians or cosmetologists. A facial protocol generally includes cleansing, exfoliating, and treating to beautify the skin. All resort spas offer skin care services (ISPA, 2016a). Eleven different facials were offered. The most common skin care treatments found on resort spa menus include anti-aging (99%), sensitive skin (97%), brightening (97%), exfoliating (95%), men’s (95%) and acne (88%) facials. Sixty-eight percent of resort spas offer skin care for your back body (68%). It wasn’t surprising to find that skin care that required specialized equipment (oxygen, microdermabrasion, galvanic and laser) were those least common on a resort spa menu. See Table 5 for details (ISPA, 2016b).

Table 5: Percent of Resort Spa Skin Care Service Offerings in 2016

Skin Care Service	**Percent**
Anti-aging Facial	99%
Sensitive Skin Facial	97%
Brightening Facial	97%
Exfoliating Facial	95%
Men's Facial	95%
Acne Facial	88%
Back Facial	68%
Oxygen Facial	45%
Microdermabrasion Facial	39%
Galvanic Facial	20%
Laser Facial	5%

Body treatments are skin care for the body. In 2016, all resort spas offered body treatments (ISPA, 2016a). Ninety-eight percent offer body scrubs, which is primarily a full body exfoliation. Body wraps are a treatment that generally includes exfoliation, product application and wrapping the body to product heat and enhance product absorption. Body wraps were offered by 94% of resort spas (ISPA, 2016b).

Salon services are beauty services offered by licensed skin, hair and nail specialists, such as estheticians, nail technicians or cosmetologists. Nail services, such as manicures and pedicures were offered by 94% of resort spas, 71% offer makeup consultation and application services and 62% offered hair services, such as cutting, coloring and styling (ISPA, 2016b).

Hydrotherapy offerings are water therapies that can be either self-administered or delivered by a treatment provider. In ISPA's 2016 Industry Study, it was reported that 47% of resort spas offered hydrotherapy (ISPA, 2016a), however in a 2016 member survey 49% was reported. The most recent data on specific hydrotherapy offerings was reported in the 2007 industry report. Approximately half of resort spas reported offering steam or sauna (54%) and whirlpools or hot tubs (53%). Other common hydrotherapy offerings include a Vichy shower (42%), baths (41%), and a swimming pool (33%). See Table 6 for details (ISPA, 2007). Hammam and scotch hose data was reported in the 2012 ISPA Spa Industry Report, showing that each is available at 2% of all spas. (ISPA, 2012).

Table 6: Percent of Resort Spa Hydrotherapy Offerings in 2007

Hydrotherapy	**Percent**
Steam/Sauna	54%
Whirlpool/Hot Tub	53%
Vichy Shower	42%

Baths	41%
Swimming Pool	33%
Watsu	7%

There is some overlap with the two core categories of body, mind and spirit (MBS) and complementary therapies. The offerings were reorganized for this report into those typically instructional and those provided by a spa therapist. The most common therapist provided therapies are reflexology (66%), cranio-sacral therapy (29%), reiki (26%) and Thai therapy (23%). The most common instructional MBS or complementary offerings are yoga (81%), meditation (32%), and tai chi (15%). The following instructional offerings were found to be offered in less than 2% of resort spas and are not included in Table 8), astrology, challenge activities (ropes course), clairvoyant/psychic readings, color analysis, creative therapy/movement, Feldenkrais method, primordial sound, shamanism, and tarot. See Table 7 and 8 for details (ISPA, 2016c; ISPA, 2016b).

Table 7: Percent of Resort Spa Therapist Provided MBS or Complementary Therapy Offerings in 2016

Therapist Provided MBS/Complementary Therapies	**Percent**
Reflexology	66%
Cranio Sacral*	29%
Reiki	26%
Thai (Nuat Thai)	23%
Acupuncture	15%
Cupping	15%
Shirodhara	9%
Crystal Therapy/Healing	6%
Meridian Line Therapy	2%
Moxibustion (Taiji Moxa)	2%
Chiropractic*	1%

*ISPA, 2016b.

Table 8: Percent of Resort Instructional MBS or Complementary Therapy Offerings in 2016

Instructional MBS/Complementary Therapies	**Percent**
Yoga	81%
Meditation	32%
Tai Chi (Chuan)	15%
Chi (Qi) Gong	9%
Music/Sound Therapy	9%

Art Therapy	6%
Breath Therapy	6%
Labyrinth	6%
Light/Color Therapy	6%
Dance Therapy	4%
Guided Imagery	4%

Wellness programs are education programs taught by individuals with a wide range of skills and backgrounds. Twelve different wellness programs were reportedly offered by resort spas in a 2013 member survey (ISPA, 2013b). The most common wellness programs include healthy eating classes (45%), cooking classes (34%), stress management (32%) and weight management (22%) offerings. See Table 9 for details.

Table 9: Percent of Resort Spa Wellness Program Offerings in 2013

Wellness Programs	**Percent**
Healthy Eating	45%
Cooking Classes	34%
Stress Management	32%
Weight Management	22%
Holistic Health	20%
Emotional Health	17%
Relationships/Couples	17%
Detox Programs	13%
Physician Consultants	9%
Teen Wellness	7%
Sleeping Consultations/Classes	7%
Other	5%
Smoking Cessation	2%

All Spa Data

As indicated in the methodology section, no data has been published for resort spas for two core categories: (1) Fitness or sports and (2) Medically supervised offerings. As this information is important for a comprehensive state-of-the-industry report, the author chose to include the most recent fitness/ sports and medical service data for all spas.

In a 2016 industry study, it was reported that 62% of resort spas have fitness/sports offerings (ISPA, 2016a). For all spas, the following fitness or sports facilities or programs were most common, fitness rooms/studio (22%), posture and alignment (18%) and body composition (15%) programs, fitness consultation

(15%) and walking/jogging (11%). Items not included in Table 10 include other racquet sports, hiking, indoor or outdoor walking track, horseback riding which were offered at less than 5% of all spas (ISPA, 2011).

Table 10: Percent of Spa Fitness or Sports Offerings in 2011

Fitness or Sports Offerings	**Percent**
Fitness Room (Studio)	22%
Posture and Alignment	18%
Body Composition	15%
Fitness Consultation	15%
Walking/Jogging	11%
Cardio Fitness (Cardiovascular)	9%
Free Weights (Weight Training)	9%
Personal Training	9%
Resistance Weight Training	9%
Tennis	8%
Group Fitness Programs	7%
Pilates	7%
Golf	7%
Biking	7%
Water Sports	5%
Volleyball	5%

In a 2016 member study, it was reported that 39% of resorts spas reported offering microdermabrasion (ISPA, 2016b). For all spas, the following medically supervised services were most common, chemical peels (13%), microdermabrasion (13%), Botox (13%), laser hair removal (10%) and medical consultation (10%) (ISPA, 2011).

Table 11: Percent of Spa Medically Supervised Spa Offerings in 2011

Medically Supervised Offerings	**Percent**
Chemical Peels	13%
Microdermabrasion	13%
Botox	12%
Laser Hair Removal	10%
Medical Consultation	10%
Laser Skin Rejuvenation	8%
Photo-Facial/Intense Pulse Light Therapy	8%
Collagen Injections	7%

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Other	4%
Other Laser Treatments	2%
Dentistry	1%
Filler Injections	1%
Skin Tightening	1%

DISCUSSION AND CONCLUSIONS

The challenge for spas is to deliver services commensurate with the needs of the market. A role of spa management is to identify what the market demands and work toward meeting those demands. Spa menus are a snapshot of what is perceived as market demand. This state-of-the-industry report provides a full record of U.S. resort spa menu offerings.

Taken as a whole, the findings show that massage and skin care services are commonplace for all resort spas, available at 100% of resort spas. Massage and skin care services each have the strongest and longest history on resort spa menus. Services that are included on over 90% of resort spa menus include Swedish, pregnancy, deep tissue, and stone massages; anti-aging, sensitive skin, brightening, exfoliating and men's facials; body wraps and scrubs, and nail services. Outside of these two core categories, the only offerings that are offered on over 50% of all resort menus are yoga, reflexology, steam/sauna, hot tub/whirlpool, hair, make-up, and nail services.

The International Spa Association has been reporting data on the spa industry for over a decade and they are committed to continue this valuable work. This report drew on information from 14 different ISPA research projects and generated a paper to help industry professionals better understand what resort spas are presenting to their guests. Confidence in the ISPA industry research data is higher than that of the member studies. Greater understanding of resort spa offerings will be realized through continued and repeated research. Attracting a larger sample size, especially with member surveys, will help reduce the margins of error and gain confidence in the results.

Research literature has identified several elements used by U.S. consumers to choose a resort including location, guest room amenities, technology accessibility, and customer experience (Brown & Stahura, 2014; Chhabra, 2010; Dotson, 2008; Yesawich, 2012). Recreation amenities, such as spas, are just one of these elements. The purpose of this research was not to attempt to provide a comprehensive overview of the resort visitor selection process, but a snapshot of resort spa offerings. It is also recognized that merely offering a resort spa offering, will not to assure owner satisfaction (Masterson and Verhoven, 1995). This study does not make recommendations for resort spa offerings; these decisions are often dependent upon location and the requisites of targeted guests (Stringam, 2008). The focus of this research was purely to generate a state-of-the-industry report to serve as a source for resort spa management information.

To date there has been no single source of information on resort spa offerings. The report provides a comprehensive look at the most recent descriptive data on spa offerings. This research can be used by resort spa managers for benchmarking, comparison, or simply inspiration for the next new spa offering. For the hospitality educator, the research was meant to provide current data to use in the preparation of spa management curriculum materials.

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