TRYBE

BENCHMARKING REPORT
2026 EDITION

The State of Spa Revenue

Global benchmarks for 2026

Operational data from more than 400 spa, leisure and activity businesses across the United Kingdom, Europe and the United States.

400+
BUSINESSES

3
REGIONS

£181m
REVENUE ANALYSED

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ABOUT THE DATA

The benchmarks in this report are drawn from real operational data across more than 400 spa, leisure and activity businesses using Trybe. They are not survey averages or industry estimates.

Foreword

For a long time, the defining question of spa and leisure success was a simple one: is the diary full?

It was a reasonable proxy. Full diaries meant busy therapists, occupied rooms, and revenue coming through the door. Operators built their businesses around it, and for many years, it worked well enough.

But that question is becoming the wrong one to ask. And the industry knows it.

The shift happening right now in spa and leisure isn't about technology or trend cycles. It's something more fundamental: a move from measuring activity to measuring value. From tracking how much is happening to understanding how much each moment is actually worth.

The most forward-thinking operators aren't asking how to fill their schedules. They're asking how to maximise the revenue generated within them.

This matters because the world around wellness has changed. Guest expectations have evolved. The 25–34 age group is now the highest-spending segment in spa and leisure, a cohort who have made wellness a form of self-investment rather than occasional indulgence. Fifty-one percent of bookings happen outside traditional office hours. Seventy-six percent arrive on a smartphone. The guest who once called reception to book a treatment is now booking on the sofa at 10pm, and if the experience isn't seamless, they won't checkout.

At the same time, operating costs are rising. Labour is more expensive. Margins are under pressure. The era of growing revenue simply by adding more appointments is running out of road.

The answer lies in data, but not in the way it's often presented. Reports and dashboards are useful, but they're not enough on their own. Having data is one thing. Knowing what it means, and what to actually do with it, is where operators have historically been left to figure things out alone.

That's what this report is designed to change.

The benchmarks you'll find here are drawn from real operational data across more than 400 spa, leisure and activity businesses across the globe. They cover revenue per available treatment hour, average guest spend, treatment pricing, booking behaviour, and performance by scale. They're not averages pulled from surveys or industry estimates, they reflect what is genuinely happening inside businesses like yours.

But data alone won't improve your operation. What moves the needle is context: understanding where you sit relative to your peers, identifying where the gap between your current performance and your potential is largest, and knowing which levers to pull to close it.

Some of those levers are pricing. Some are scheduling. Some are the way your offering is structured, because properties generating the highest revenue per hour aren't necessarily the largest or the busiest; they're the most intentional. They design their days around demand, build packages that remove friction for guests, and treat their booking data as a live strategic tool rather than a historical record.

This report won't tell you what to do. But it will give you something arguably more valuable: an honest view of where the industry stands, where the outliers are winning, and what the gap between average and excellent actually looks like in numbers.

Amy Moore
Trybe

> The diary question isn't going away. But the operators who will lead this industry forward are already asking a better one.

Global benchmarks for 2026; the numbers that matter

4.5x
US REVENUE PER LOCATION VS UK

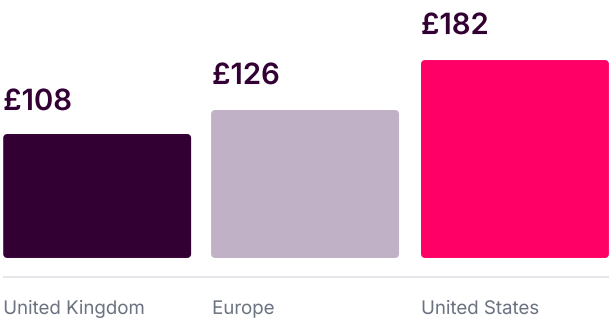
93%
OF BOOKINGS COME THROUGH PACKAGES (SPA DAYS & BREAKS)

£266
AVERAGE INCREMENTAL UPSELL VALUE PER GUEST

£540bn
GLOBAL WELLZOOMER OPPORTUNITY

REVPATH: THE EFFICIENCY STORY

REVPATH BY MARKET — Per available treatment hour



69% The gap between UK and US RevPATH; the starkest single comparison in the report.

SCALE VS PERFORMANCE

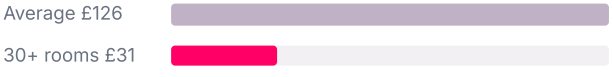
UNITED KINGDOM — 2x+

Operators with **1–5 treatment rooms** outperform those with 30+ by more than double on RevPATH.



EUROPE — £31

The 30+ room cohort collapses to **just 24%** of the European average.



BOOKING BEHAVIOUR

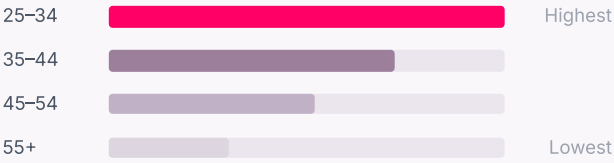
51% of bookings happen **outside office hours**.

76% are made on a **smartphone or tablet**.

Sat / Mon — Saturday takes the highest spend, Monday the lowest; **same guest, very different mindset**.

THE GUEST SHIFT

SPEND BY AGE SEGMENT — HIGHEST TO LOWEST



55+ is the audience most spas were built for. Indicative ranking of average spend per guest.

+255% Growth in **male bookings** between 2024 and 2025, the fastest-moving segment in the dataset.

THE PRICING PARADOX

European spas charge less for treatments than the UK, yet earn more per guest and more per location.

Benchmarks drawn from real operational data across more than 400 spa, leisure and activity businesses using Trybe. Figures are not survey averages or industry estimates.

01

The global landscape

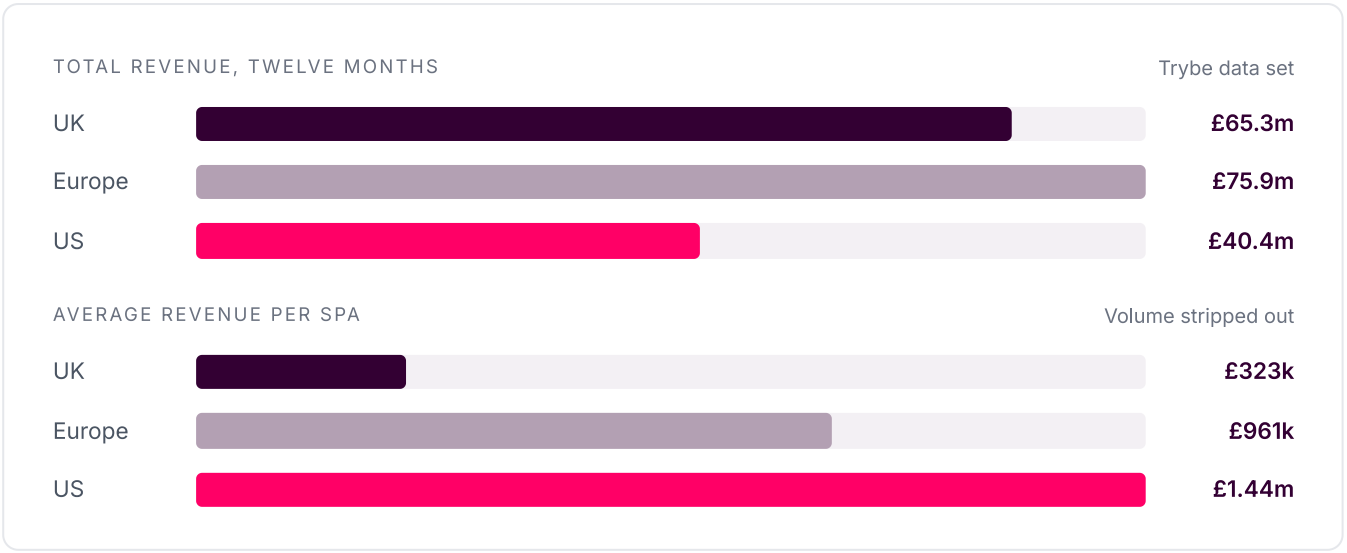
Three markets offering broadly the same services, performing very differently. Same industry. Very different outcomes.

The global landscape

Operating across the globe, Trybe's data spans all markets, all with different spending habits and wellness culture. Our data is focussing on the United Kingdom, Europe, and the United States, and what the data tells us, is a story that is equal parts revealing and provocative.

At a surface level, these markets offer broadly the same services: massage, body treatments, facial therapies, wellness experiences. But financially, they perform very differently. And, that gap is where the opportunity lies.

The numbers, at a glance



The UK in our data set saw revenue reaching £65.3 million in total revenue over twelve months. Europe follows with £75.9 million in revenue, and the United States has produced £40.4 million.

But when we look at revenue per site, and a very different picture emerges. Average revenue per spa in the UK sits at 323,000. In Europe, that figure rises to £961,000, nearly three times higher, and the US reaches £1.44 million. American spas are generating more than four times the per-site revenue of their UK counterparts.

Same industry. Very different outcomes.

EXTERNAL CONTEXT; ISPA, 2026

According to the 2026 ISPA U.S. Spa Industry Study, the American spa industry generated $23.5 billion in total revenue in 2025, across 22,060 locations and 191 million visits.

One thing impacting overall revenue per spa is treatment prices; and it's interesting to see the cost difference per treatment length across the three regions.

TREATMENT LENGTH	UK	EUROPE	US
90 minutes	**£200**	**£168**	**£275**
60 minutes	**£126**	n/a	**£200**

+£75

more for a 90-minute treatment in the US than the same treatment in the UK

~15,000

guests per US spa over twelve months, at an average spend of £100

A 90-minute treatment in the US commands £75 more than the same treatment in the UK. That premium, compounded across thousands of appointments, creates a powerful multiplier effect on total revenue. The question operators should ask is not simply whether they can charge more, but whether they're currently delivering, and communicating, enough value to justify it.

The US also leads on guest volume and average spend. With close to 15,000 guests per spa over twelve months, and an average spend of £100 per guest, £21 more than the UK and £15 more than Europe, the combination of higher footfall and higher spend per visit compounds into a structural revenue advantage.

Why the gap?

The divergence in per-location performance raises an obvious question: why? There's no single answer, but three hypotheses are worth examining.

01

Market density

In the UK, consumers have significantly more choice. Spa and leisure is well-established, competitive, and broadly accessible. In the US, and to some extent Europe, the market is less saturated in many regions. When consumers have fewer options, they're less able to shop around on price, and operators have less pressure to discount.

02

Pricing strategy

Dynamic pricing and yield management are more embedded in the commercial culture of US and European wellness businesses. UK operators have historically been slower to adopt revenue management principles from adjacent hospitality sectors, though that is beginning to change.

03

Marketing and positioning

US spas tend to market themselves differently: less as a service, more as an experience and investment. That framing shapes not just guest expectations, but willingness to spend.

02

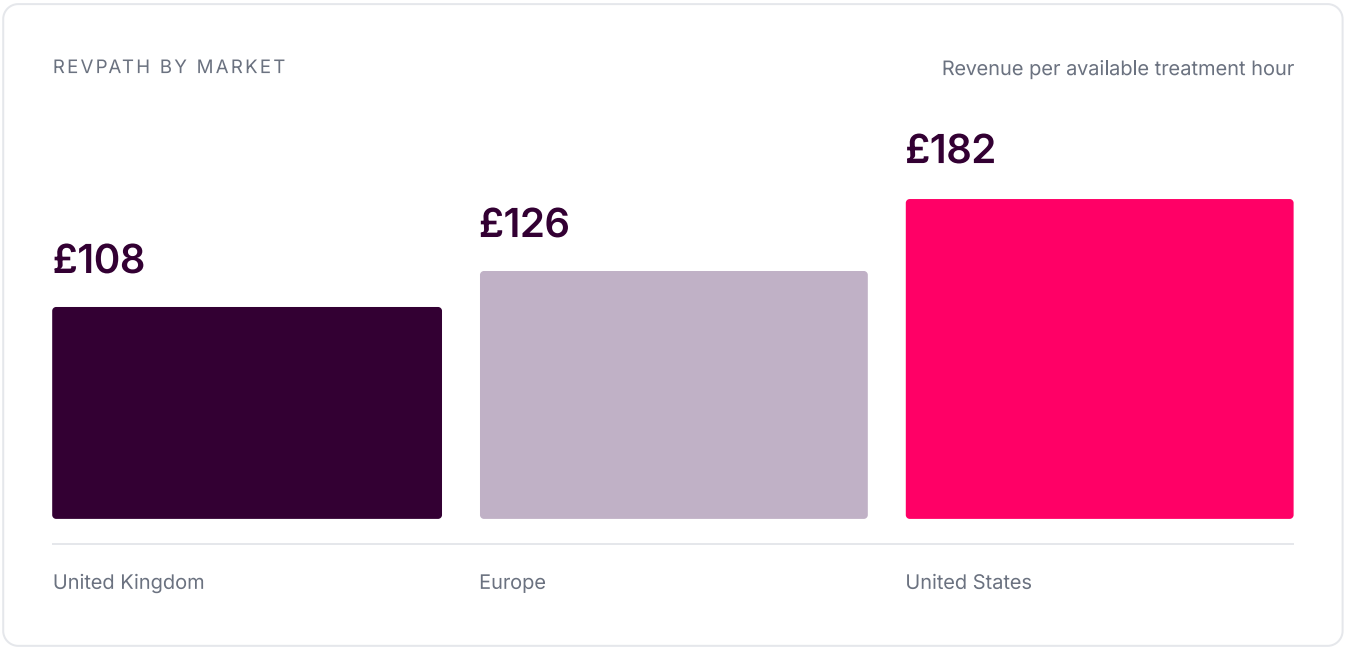
RevPATH: the efficiency story

Revenue per available treatment hour measures the productivity of a spa's time, not just its output.

RevPATH: the efficiency story

Beyond headline revenue and pricing, Trybe data reveals something important about how effectively each market is actually using its treatment capacity. RevPATH (Revenue Per Available Treatment Hour) measures the productivity of a spa's time, not just its output.

The results are stark.



What does this contrast in RevPATH mean? Well, in practice US spas experience less downtime, stronger monetisation of available time, and more consistent yield across the day. They are not simply charging more, they are filling that capacity more effectively, and extracting more value from every hour their doors are open.

> **The US has found a way to do more with the same space.**

+50%

growth in touchless and technology-led wellness treatments in the United States

Infrared · cryotherapy · flotation · red light

Treatments requiring no therapist time, able to run concurrently alongside traditional services

The rise of touchless therapies

Part of this can be explained by a structural shift in the US market: the rapid growth of touchless therapies. Post-pandemic, touchless and technology-led wellness treatments, infrared, cryotherapy, flotation, red light, grew by 50% in the United States, driven by demand for high-tech, personalised options and heightened sensitivity around hygiene. These treatments consistently rank among the top trending spa experiences globally.

Crucially, they also require no therapist time, meaning they can run concurrently alongside traditional treatments, increasing room utilisation without increasing headcount.

Trybe's RevPATH measure is based on treatment room usage, not therapist hours. The rise of touchless therapies is therefore not just a guest experience trend, it's a capacity and revenue story.

We're also seeing properties quietly build a new revenue stream by renting professional-grade wellness equipment, red light therapy masks, percussive massage devices, sleep and recovery tools, directly to guests for in-room use. The logic is simple: a guest who couldn't get a treatment slot, is time-poor, or simply prefers the flexibility of their own space will still spend if given a well-presented alternative.

Offered through a properly merchandised booking flow, pre-arrival or on-property, in-room rentals convert latent demand into real margin, and crucially, they run entirely independently of the treatment schedule, generating revenue long after the spa has closed.

The US has found a way to do more with the same space. For UK and European operators, Trybe's seeing a rise in popularity of wellness outside of the traditional spa space, but it's something that is only just starting to come to market.

03

Scale vs. performance

The counterintuitive finding: bigger operations do not perform better. At least not when it comes to RevPATH.

Scale vs. performance

If the global landscape tells a story about markets, this section tells a story about businesses, and it challenges one of the most deeply held assumptions in hospitality: that bigger operations perform better.

They don't. At least not when it comes to RevPATH.

At a glance...

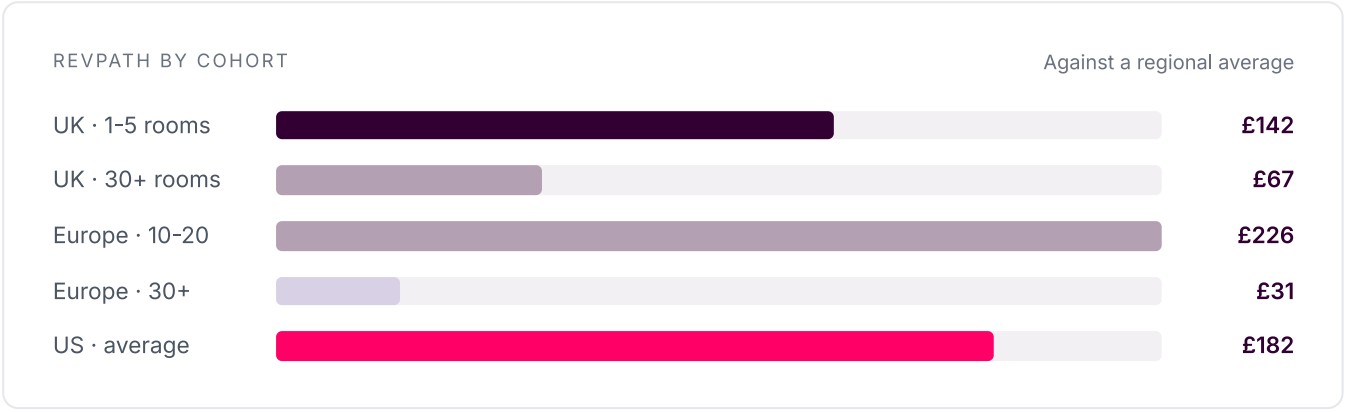
Bigger isn't better	UK operators with 1–5 treatment rooms show more than double the RevPATH of those with 30+. That gap may reflect structural mismatch as much as operational drag*. Before a 30+ room portfolio acts on this, check it against ancillary square footage and room mix.
Europe's mid-size sweet spot	The 10–20 room cohort hits £226 RevPATH, nearly double the European average. But, what are they doing differently to smaller, or large scale properties?
Pricing isn't the primary lever	European spas charge less for treatments than the UK, yet earn more per guest and far more per location. The gap is driven by utilisation and packaging, not price.
The US advantage compounds	Higher pricing, more guests, higher spend per visit, stronger RevPATH, all four working simultaneously. That multiplier effect explains the 4.5x revenue-per-location gap more than any single variable.
Europe's largest operators have a problem	The 30+ cohort dropping to £31 RevPATH, 24% of the regional average, isn't underperformance, it's a structural issue. For large European groups, it's likely the most uncomfortable number in this report.

THE COMMON THREAD

The operators winning on RevPATH do so through intentional design, how they schedule, package, and price, not through size or pricing power alone.

*Large resort-style properties typically carry more ancillary space (pools, thermal suites, gyms, lounges) per treatment room than boutique comparisons, which would mechanically depress RevPATH regardless of scheduling or staffing efficiency.

Now, let's break the data down by size...



UK

In the UK, the highest-performing cohort by RevPATH is the smallest one. Properties operating one to five locations generate a RevPATH of £142, 31% above the UK average, and more than double the £67 recorded by operators running thirty or more rooms. The performance curve doesn't gradually decline as scale increases; it drops sharply at the six-to-ten treatment room size and never fully recovers. The UK's largest operators are, by this measure, its least efficient.

Europe

Europe tells a different story, but reaches a similar conclusion. The peak performers here are mid-size groups, ten to twenty locations, generating £226 per available treatment hour, 79% above the European average and among the highest figures in this entire dataset. What follows that peak is striking: operators with thirty or more treatment rooms record a RevPATH of just £31, a collapse to 24% of the regional average. The gap between a mid-size spa and its largest counterpart is not marginal, it is vast.

US

The US shows the flattest profile of the three markets. Smaller and mid-size operators perform consistently close to the national average of £182, with only a modest drop at twenty or more locations and no meaningful data for the thirty-plus cohort. The US market appears more resilient to scale-related performance drag, though whether that reflects operational maturity, market structure, or the technology embedded in larger American operations is worth examining further.

The workforce factor

This may not be pure inefficiency. The UK's ongoing recruitment and retention crisis limits how many rooms operators can reliably staff, and larger sites carry proportionally more of that exposure. A room that can't be staffed doesn't just sit underused, it drops out of the RevPATH calculation entirely.

The pattern across all three markets points to the same underlying tension: scale introduces complexity, and complexity, without the right systems, erodes efficiency.

Larger groups face more rooms to organise, more therapists to schedule, and more diary gaps to manage across a wider estate. When those operational challenges outpace the infrastructure designed to handle them, RevPATH suffers.

This doesn't mean growth is the wrong strategy. It means growth without a corresponding investment in operational intelligence is a liability. The mid-size operators who peak in each market aren't generating higher RevPATH by accident, they have typically reached a scale where demand is strong and systems are tight, without yet encountering the drag that comes with managing dozens of sites simultaneously.

FOR OPERATORS IN THE LARGER COHORTS

What would it take to perform like your smaller competitors?

Other factors likely at play

Two structural factors are worth testing against this data before concluding room count itself is the driver: workforce availability, and how consistently capital is invested per room as portfolios grow.

Workforce

The UK's recruitment and retention crisis is a strong candidate explanation for the sharpest drops in this dataset. A 30-room site needs a proportionally larger, consistently available therapist team than a 5-room one. Falling short doesn't just lower utilisation, it removes capacity from the RevPATH calculation outright.

Investment

Boutique operators often concentrate capital in fewer rooms, equipping them with higher-margin, lower-labour experiences (thermal suites, hydrotherapy, touchless amenities) that keep earning even when staffing is tight. Larger estates spreading the same budget across more rooms dilute that effect room by room.

Neither is proven by this dataset alone, but both point to the same lever for the largest cohorts: staffing model and capital allocation, not treatment-room count, are what's worth interrogating first.

04

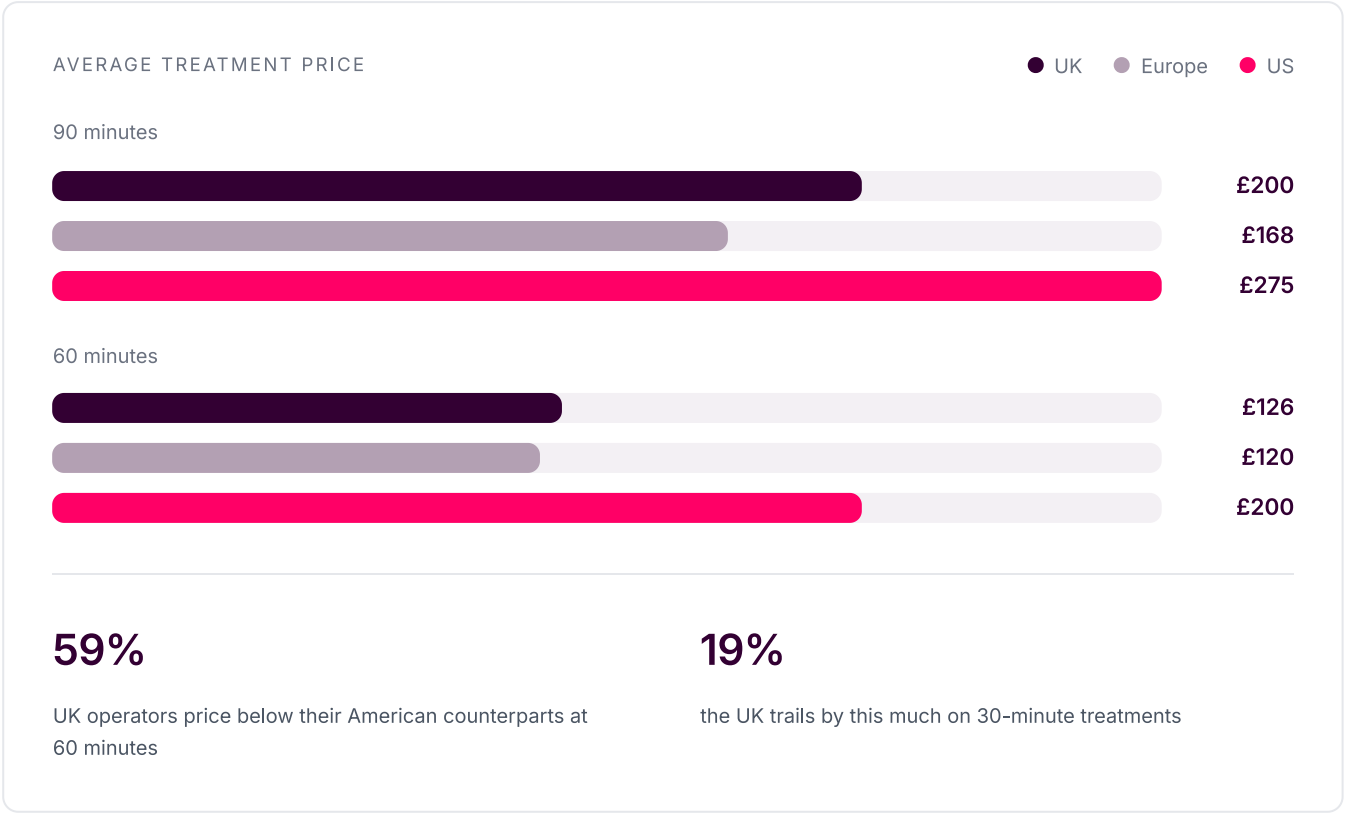
Pricing benchmarks

The treatment menu is where revenue strategy becomes visible. Across three markets, the same services are priced very differently.

Pricing benchmarks

The treatment menu is where revenue strategy becomes visible. And across the UK, Europe, and the United States, the same services are priced very differently.

The US leads across every duration. A 90-minute treatment averages £275 in the US, compared to £200 in the UK and £168 in Europe.



59%

UK operators price below their American counterparts at 60 minutes

19%

the UK trails by this much on 30-minute treatments

At 60 minutes, the gap widens further: the US charges £200, while the UK sits at £126, meaning UK operators are pricing 59% below their American counterparts on the same treatment duration. At 30 minutes, the UK trails by 19%.

Resort and hotel spas vs. day spas

ISPA's 2026 research adds a useful layer of pricing context for us. Across all US spas, the average price per massage in 2025 was $121. But that average masks a significant divide by property type.

US AVERAGE PRICE	RESORT & HOTEL	DAY SPA
Massage	$211	$104
Body treatments	$221	$133
All services	$194	$110

A differential of $84 per transaction. Source: 2026 ISPA U.S. Spa Industry Study.

What makes the UK picture particularly striking is that Europe charges less than the UK across every treatment length, yet outperforms the UK on both revenue per guest and revenue per site. Price is clearly not the whole story.

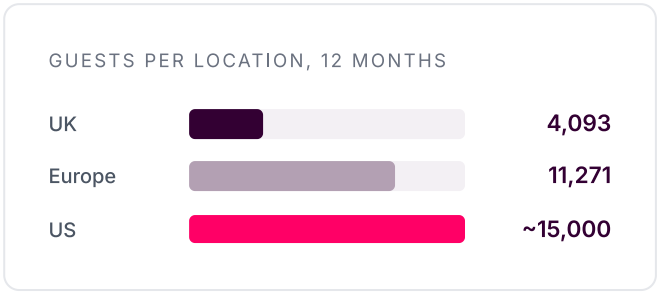
Premium pricing only holds when guests believe the experience justifies it. The data suggests US operators have, to a greater degree, built that case, through how they position their offering, how they package it, and how they manage demand across the day.

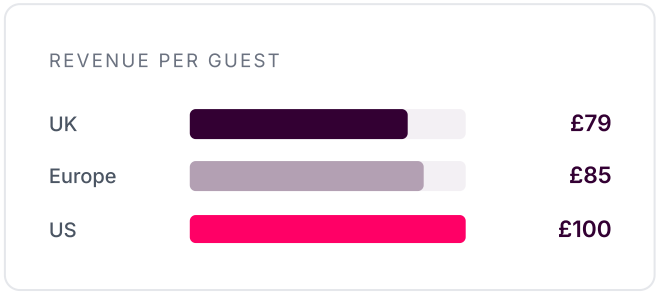
For UK operators, the gap between current pricing and US benchmarks isn't an instruction to raise prices. It's an invitation to examine whether the value being delivered is being fully reflected in the price being charged, and whether strategies like dynamic pricing and yield management are being used to protect and grow that value at the right moments.

> **Is the US achieving higher revenue because it charges more, or because it delivers and communicates value differently?**

The multiplier effect: volume, spend, and why the US compounds

Pricing alone doesn't explain why US spas generate more than four times the per-location revenue of their UK counterparts. To understand that gap, you have to look at volume and spend together.





US spas in this dataset average close to 15,000 guests per location over twelve months. European spas average 11,271. UK spas 4,093. The US isn't just charging more per treatment, it's serving significantly more guests per site.

And those guests spend more. Average revenue per guest in the US is £100, compared to £85 in Europe and £79 in the UK. The difference between the UK and US is £21 per guest, modest in isolation, but multiplied across nearly four times the guest volume, the effect on total revenue is profound.

This creates a compounding dynamic that the UK market, in its current form, isn't replicating. Three factors are likely at play. First, market density: the US has fewer spa locations relative to its population in many regions, meaning guests have less choice, less ability to shop around, and operators face less pressure to discount. Second, demand management: yield management and dynamic pricing strategies are more embedded in US wellness operations, protecting margins during peak periods and capturing higher spend from guests who are ready to pay for it. Third, marketing and positioning: US spas tend to sell experiences and outcomes rather than treatments and durations, a framing that supports both higher pricing and higher volume.

None of these factors are exclusive to the US market. The question for operators in the UK and Europe is which of them can be meaningfully shifted.

05

The guest opportunity

All of the revenue data in this report is generated by people. And those people look different to the guests much of the industry was built to serve.

The guest opportunity

All of the revenue data in this report is generated by people. And the people driving spa and leisure spend right now look different to the guests that much of the industry was built to serve.

HIGHEST SPENDING

25–44

the cohort researchers have begun calling WELLZoomers

LOWEST SPENDING

55+

traditionally the core spa market

The highest-spending segment in spa and leisure today is the 25 to 44 age group; this age group has started to be called WELLZoomers.

These are health-conscious guests who don't treat wellness as an occasional indulgence, and prioritise this over nightlife and drinking alcohol. They treat it as infrastructure. Massage, contrast therapy, recovery, breathwork, sleep optimisation, combined into a personal, evolving approach to their own health, with longevity as the organising principle.

For this guest, a spa visit isn't a treat. It's part of a deliberate routine.

This matters because many spa businesses have historically structured their offering around a 35-plus audience. Trybe data now shows that the 55-plus demographic, traditionally the core spa market, is the lowest-spending segment. The market has moved. Strategies built for yesterday's guest are being outpaced by a guest with different expectations, different booking behaviour, and significantly higher willingness to spend.

Understanding how these guests book is as important as understanding who they are. Fifty-one percent of bookings through Trybe happen outside of traditional office hours. Seventy-six percent are made on a smartphone or tablet. This guest isn't calling reception during a lunch break. They're booking on the sofa at 10pm, on a commute, or between meetings, whenever the impulse strikes and the experience allows it.

If the booking journey isn't mobile-first, fast, and available around the clock, that impulse doesn't convert. It disappears.

Timing matters within the week too...

MONDAY

**Most bookings,
lowest average spend**

SATURDAY

**Fewest bookings,
highest spend per transaction**

Monday is the most popular day to book, but it carries the lowest average spend. Saturday sees fewer bookings overall but the highest spend per transaction. Operators who treat all booking traffic the same are leaving revenue on the table.

Promoting premium packages and higher-value experiences on weekends, and using midweek communications for entry-level offers, is a simple segmentation that the data consistently supports.

93%

of bookings come through packages: spa days and breaks

The clearest expression of what guests want is in the package data. Ninety-three percent of bookings through Trybe come through packages: spa days and breaks that bring together multiple parts of a booking, such as treatments, wet facilities, dining and experiences. They present clear value, remove the friction of decision-making, and open up the ability to upsell throughout the booking flow.

When that transaction is designed well, with relevant upsells embedded into the booking flow, the average incremental upsell value across Trybe's platform is £266.

There is one additional pressure worth naming. The 2026 ISPA U.S. Spa Industry Study identifies staffing as the single biggest challenge facing US spas in 2026, cited by one in three operators, with recruitment of qualified massage therapists at the top of the list. This constraint makes the guest opportunity simultaneously more urgent and more complex. If therapist capacity is limited, the path to revenue growth runs not through volume alone but through yield, ensuring that every available hour, every booking slot, and every guest interaction is generating the maximum possible value.

> **The WELLZoomer is ready to spend. The operational question is whether the business is structured to capture it.**

06

What top performers do differently

Not size, not location, not price point. What unifies every high-performing cohort in this dataset is intentionality.

What top performers do differently

The benchmarks in this report describe where the industry stands. We're now going to talk about the key drivers separating the operators at the top of those benchmarks from those sitting below the average, and what the patterns in the data reveal about how that gap is created.

Something that unifies every high-performing cohort in this dataset is not size, not location, and not price point. It is intentionality. The operators generating the strongest RevPATH share a common characteristic: they have made deliberate decisions about how their time, space, and guest relationships generate revenue. They are not reacting to demand. They are designing for it.

1 **They lead with packages, not treatments.**

Ninety-three percent of bookings through Trybe's platform come through packages: spa days and breaks that combine multiple parts of a booking, such as treatments, wet facilities, dining and experiences. This is not a coincidence, it is the result of operators deliberately structuring their offer around curated experiences rather than individual pick n mix selections. Packages remove friction for the guest, communicate value clearly, and consistently produce higher average transaction values than unbundled treatments. Top performers don't present packages as an alternative option buried in the booking flow. They make them the primary offer, the default entry point, the thing a guest encounters first.

Guests want value for money, and the perceived value that they're getting a personalised offer tailored to their wants and needs; bundling together a treatment, wet facility access, lunch, and an upsell in the form of a product or treatment upgrade. The properties offering this to guests are visibly reaping the rewards.

2 **They embed upselling into the journey, not the conversation.**

The average incremental upsell value across Trybe's platform is £266. The operators achieving that figure are not relying on front-of-house teams to identify and pitch upgrades during check-in. They have built the upsell into the booking flow itself, surfacing relevant enhancements at the moment a guest is most engaged and most likely to spend. Automated upsells consistently outperform manual selling. The logic is straightforward: the right offer at the right moment feels like service, not sales.

3 **They treat the diary as a revenue instrument, not a schedule.**

Low-performing operators fill gaps reactively. High-performing operators design their days intentionally, structuring availability around demand patterns, protecting peak periods for high-margin services, and using quieter windows strategically rather than discounting them. This shift from reactive scheduling to intentional diary design is one of the clearest behavioural differences between operators above and below the RevPATH average. It requires knowing when guests book (51% outside office hours), when they spend most (Saturday, not Monday), and building a commercial strategy around those realities rather than around operational convenience.

4 **They use yield management and dynamic pricing as a standard tool, not an experiment.**

38%

UK–US pricing gap on 90-minute treatments

59%

UK–US pricing gap on 60-minute treatments

This pricing gap isn't solely explained by market difference. It's also a reflection of how confidently operators in each market are using pricing as a lever. Industry research shows that only 18% of US spas use automated dynamic pricing structures in their booking software, and 42% of spas use none of the listed pricing or availability strategies at all.

But why is this?

- Is it because businesses are worried about how guests will react?
- Are they unsure how to implement the strategies and tools available to them?

The evidence points to both, and they tend to reinforce each other.

There's two key compounding gaps: a confidence gap (fear of guest pushback in a relationship-heavy service category) and a capability gap (uncertainty about which tools to adopt and how to run them). The operators who've closed both gaps tend to show it in the numbers: one industry survey found 72% of software-adopting salons/spas earned over $100,000 in revenue, versus 60% of non-adopters, a gap that's consistent with pricing sophistication being a real lever, not just a nice-to-have.

But within the resort and hotel segment, the cohort most closely represented in Trybe's US data, 57% vary prices by date or time of service, compared to just 22% of day spas. The performance gap between these two groups is significant, and it is not a coincidence. Peak periods are protected. Lower-demand windows are stimulated with targeted offers rather than blanket discounts. The result is a revenue curve that is more consistent across the week and more resilient across the year.

Additionally, spas using fixed pricing lose an average of 20% potential revenue during high-demand periods and a 2024 industry survey found that spas using dynamic pricing systems reported a 32% improvement in off-peak utilisation while maintaining peak period revenue.

What's striking is that even in the US, the highest-performing market in this dataset, dynamic pricing remains the exception rather than the rule. The opportunity to close the gap through smarter demand management is not just UK specific.

5 **They have built their offer around the guest who is actually spending.**

25–44	now the highest-spending segment in spa and leisure
+255%	growth in male bookings between 2024 and 2025
55+	historically the industry's core audience, now the lowest spender

Top-performing operators have recognised this shift and responded to it: in how they package their offer, how they communicate it, where they promote it (mobile-first, always-on), and what the experience feels like to a guest who views wellness as a long-term investment rather than an occasional escape.

6 **They measure the right things.**

Operators who track RevPATH alongside occupancy, who monitor upsell conversion rather than just treatment volume, and who use rebooking rates and waitlist data as active commercial signals consistently outperform those who rely on instinct and end-of-month revenue totals. The shift from data as a historical record to data as a live decision-making tool is, perhaps more than any other factor, what distinguishes the operators leading this industry from those following it.

The gap between average and excellent in this dataset is not a matter of resources or market privilege. It is a matter of design, how deliberately and systematically an operator has built their commercial model around the realities of how guests behave, what they want, and when they are most ready to spend.

So, you've got the data but, where do you go from here?

3	400+	Millions
regions	spas	of data points

This report has covered a lot of ground. Three markets. Over four hundred spas. Millions of data points distilled into a picture of where the industry stands, where the gaps are, and what the operators at the top of the performance curve are doing differently.

The headline findings are clear. The US compounds its advantage through volume, spend, and yield management simultaneously. Europe's mid-size operators have found a sweet spot that larger groups in the same market can't replicate. The UK is underpricing relative to its competitors, underutilising its treatment hours relative to its potential, and in many cases still building commercial strategy around a guest demographic that is no longer the highest spender.

But benchmarks are only useful if they're applied. A number in a report changes nothing. A number compared against your own operation changes everything.

The first question you should be asking yourself is: how does your spa compare? Look at your RevPATH, look at your pricing, look at your treatment offerings.

It takes one figure to help you assess where you can make changes, improve offerings, and see returns you didn't think were possible.

> **The first question you should be asking yourself is: how does your spa compare?**

Let's talk about your benchmarks

If you'd like to understand your benchmarks in more detail, explore what the data means for your specific operation, or talk through how Trybe can help close the gap between where you are and where the top performers sit, we'd love to hear from you.

Reach out to Amy directly to chat with the team. We know that the most useful conversation isn't about software, it's about revenue, and what's getting in the way of more of it.

AM

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The data is here. The benchmark is set. The next step is yours.