INTERNATIONAL SPA ASSOCIATION®

ISPA 2006 SPA-GOER STUDY

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ISPA 2006 Spa-goer Study

U.S. and Canadian Consumer Attitudes and Spa Use

PREPARED FOR
THE INTERNATIONAL SPA ASSOCIATION

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A QUANTITATIVE STUDY BY THE HARTMAN GROUP, INC.

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Preface

About the International SPA Association
ISPA is recognized worldwide as the leading professional organization and voice of the spa industry. Founded in 1991, ISPA's membership is comprised of more than 2,700 health and wellness facilities and providers from 75 countries. ISPA strives to advance the professionalism of the spa industry by providing invaluable educational and networking opportunities, to promote the value of the spa experience to society, and to be the authoritative voice of the spa industry.

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About The Hartman Group
The Hartman Group, founded in 1989, is a full-service consulting and market research firm offering a wide range of services and products focused on health and wellness consumer understanding. We specialize in the analysis and understanding of consumer lifestyles, uncovering why consumers shop and purchase wellness products and services, and identifying opportunities that can be derived from these behaviors.

Disclaimer
Although the information in this report has been obtained from sources that The Hartman Group believes to be reliable, its accuracy and completeness cannot be guaranteed. This report is based on survey responses from surveys conducted in 2005 and 2006. This report is for information purposes only. All opinions and projections included in this report constitute the interview respondents' and The Hartman Group's judgment as of this date and are subject to revision. Forecasts are subject to uncertainty and evolving trends: actual results may vary from forecasted or projected results.

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Spas are entities devoted to enhancing overall well-being through a variety of professional services that encourage the renewal of mind, body and spirit.

Executive Summary

The Diverse Population of Spa-Goers

The increasingly diverse interests of spa-goers make it more challenging than ever to satisfy the needs and desires of the spa-going consumer population. Roughly 32.2 million adults in the U.S. and 3.7 million Canadian adults visited a spa in 2005. These consumers come from all walks of life in search of indulgence, escape and self-improvement from their spa visits. Because not all spa-goers are looking for the same benefits, catering to their varied likes and dislikes can prove to be a difficult task. The current report is intended to make that task easier.

Using data collected in 2005, this report presents an in-depth look at spa-goers from the U.S. and Canada. Throughout the report, special attention is paid to differences across countries, as well as spa-goers' demographics (particularly their gender and age) and their intensity of participation in the spa "world."

Consumer Segmentation in the World of Spas

The "World of Spas" is a shorthand way of referring to all of the individuals and businesses that use, maintain, manage, support or otherwise deal with spas. Among consumers, not all participate in the spa world to the same degree. We can think of spa-goers as falling into three distinct contingents or "segments," depending on how involved they are in the World of Spas. At the heart of this world is a relatively small segment of Core spa-goers who feel that learning about and going to spas is important to their lifestyle; they view cosmetic services as superficial and approach spas with more therapeutic ends in mind. At the other extreme is a Periphery segment of spa-goers who enjoy going to spas but otherwise show little interest in them; they typically seek indulgent and cosmetic services to make them feel special and look beautiful. Between these two segments is the largest segment: Mid-level spa-goers who are interested in learning more about spas but lack the commitment and passion of the Core spa-goers; they strive to strike a balance between pure pampering and transformative mind, body and spirit experiences.

ISPA's Examination of the Spa World

As a follow up to the *ISPA 2004 Consumer Trends Report: Variations & Trends on the Consumer Experience*, the International SPA Association commissioned The Hartman Group to conduct quantitative and qualitative research to gain greater understanding of spa-going consumers in the US and Canada. The current report – *ISPA 2006 Spa-goer Study: U.S. and Canadian Consumer Attitudes and Spa Use* – represents the third in a trilogy of these recent ISPA-sponsored examinations of the spa industry. Previously, ISPA in partnership with the Canadian Tourism Commission funded a study of U.S. and Canadian spa travelers (consumers who visit spas while traveling away from home), resulting in a 2006 report entitled *Identifying the Spa Traveler: A Look at US and Canadian Consumer Attitudes and Motivators for Spa Vacations*.

More recently, The Hartman Group conducted qualitative research to provide a comprehensive look at consumer perceptions and expectations of spas across spa type and consumers' intensity of participation in the spa "world." The findings are presented in the report *ISPA 2006 Consumer Report: Spa-goer and Non-Spa-goer Perspectives.*

The current report provides a quantitative counterpart to the *Consumer Report*. By analyzing the online survey responses from over 3600 spa-goers in the U.S. and Canada, quantitative researchers at The Hartman Group describe common demographic, behavioral and attitudinal characteristics of spa-going consumers and their spa experiences. Throughout the report, attention is also paid to differences across countries and spa-goers' demographics, particularly those of gender and age.

Key Findings from the Current Study

Below are listed some of the key findings contained in this report.

Overview of the Spa-Going Consumer Population

Description of Spa Types

This study examines seven primary types of spas common in North America. For purposes of presenting results, we usually classified these seven types into three general categories of spa: day, resort/hotel and other (the latter consisting of destination, medical, club, mineral springs and cruise ship spas). Findings for which spa-goers are classified by spa type are based on the type of spa *last visited* by the spa-goer.[1]

[1] We use the last spa visited in order to ensure that spa-goers relate the concrete experiences of their most recent spa visit rather than attempt to recall their "usual" experiences on multiple past occasions.

Prevalence of Spa-goers

In both the U.S. and Canada, about one quarter of adult consumers (26% of Americans and 25% of Canadians) has visited a spa. These percentages translate into roughly 57 million U.S. adults (aged 18 and older) and 6.3 million Canadian adults. More recently, 15% of all Americans and 14% of all Canadians have visited a spa within the previous 12 months. These active spa-goers, representing 3.7 million Canadian consumers and 32.2 million U.S. consumers, are the focus of this study.

Duration as a Spa-goer

Active U.S. spa-goers have on average been going to spas longer than their Canadian counterparts. While 71% of U.S. spa-goers have been going to spas for at least 3 years, only 57% of Canadians make that claim. And while only 15% of U.S. spa-goers are newcomers in their first year of spa-going, a full one-quarter (26%) of Canadian spa-goers are in their first year. Although women are much more likely than men to go to spas, there is essentially no difference between male and female spa-goers in terms of how long they have been going to spas. Notably, in the U.S. but not Canada, there is a sizable portion (15%) of older users (ages 55 and over) who are long-time spa users, visiting spas for more than 20 years.

Aging and Impediments to Going to Spas

We find that some impediments to spa-going actually decline in significance as the individual gets older, a sign of increasing experience and knowledge. For example, not knowing what to expect at a new spa is a common concern among the youngest spa-goers, but negligible among the oldest spa-goers in the U.S. The barrier found disproportionately among older spa-goers turns out to be lack of interest.

Spa Types

Gateway Spas

Spa-goers in both countries typically enter the spa world through day spas; 49% of U.S. consumers and 60% of Canadian consumers initially visited a day spa.

Spa Types Visited

Of the seven different spa types, day spas are the most popular in both the U.S. and Canada, while resort/hotel spas also enjoy considerable use by consumers. Just over three-quarters of spa-goers in both the U.S. and Canada reported visiting a day spa in the past year. The second most popular spa type in both countries is clearly the resort/hotel spa, though it is more popular among U.S. spa consumers (64% of spa-goers visited one in the past year) than among Canadians (48%). Among the remaining spa types, cruise ship spas are more popular among U.S. spa-goers (21% vs. 10% of Canadian spa-goers), while medical spas have a larger following among Canadians (20% of spa-goers) than in the U.S. (12%).

Type of Spa Last Visited

Another way to compare the popularity of spa types is to assess which type of spa has been visited more recently by each respondent. Using this classification, day spas are again clearly the most popular type of spa in both the U.S. and Canada. Just over half (52%) of the survey's U.S. respondents and 59% of its Canadian respondents reported day spas as the spa type they most recently visited. And again, the second most popular spa type is undoubtedly resort/hotel spas, visited most recently by just over a quarter of both U.S. and Canadian spa-goers. Among the remaining spa types, U.S. spa-goers tend to favor cruise ship spas (with 8% visiting most recently), while Canadians prefer medical spas (6%).

Recent Changes in Types of Spas Visited

Compared to 2003, spa visits to club spas have fallen sharply among spa-goers in both countries. In 2003, a much greater percentage of spa-goers went to club spas than did in 2005. Interestingly, the drop in club spa visits was made up by visits to others kinds of spas in differing ways in the U.S. and in Canada. Canadian spa-goers increased (by four times) their propensity to visit resort/hotel spas. U.S. spa-goers, on the other hand, favored day spas while in Canada spa-goers decreased their day spa visits. In addition, U.S. spa-goers decreased their use of medical spas while Canadians were increasing their use.

Spa Services

Gateway Spa Services

Body massage is the most common spa treatment initially experienced by spa-goers, but this is much more true in the U.S. (where 68% of spa-goers experienced it first) than in Canada (45%). Manicures and pedicures are about twice more likely to be gateway treatments for Canadians than for U.S. consumers. Women are much more likely than men to have started out with spa services to enhance their appearance, focusing on those elements (e.g., face and hands) that are most often on display. More to the point, these services are indicative of the typical entry point into the spa world and demonstrate that men are more likely to have started at the Mid-level, while a significant percentage of women began at the Periphery.

Spa Services Experienced

In large part, the popularities of specific spa treatments are strikingly similar in both countries. The six most popular spa services (though not necessarily in the same order) in both countries are standard full-body (Swedish) massage, manicure, pedicure, facial, deep tissue massage and sauna/steam bath. But Swedish massage is more popular in the U.S., while energy work (such as Reiki and reflexology) enjoys more popularity in Canada than in the U.S. Not surprisingly, in both the U.S. and Canada, female spa-goers are much more likely than men to receive manicures, pedicures and facials. Conversely, while men visit spas in lower numbers than do women, those who do go are (in both countries) more likely than female spa-goers to have received a Thai massage. And Canadian men don't stop there. Among Canadian spa-goers, men are also more likely than females to experience Tai Chi and the following additional types of massages: Swedish full-body, deep tissue, Shiatsu and couples.

Recent Changes in Use of Spa Services

Manicures, pedicures, facials and sauna/steam baths have all grown in popularity since 2003. Also, body scrubs/wraps (especially in the U.S.) and aromatherapy (especially in Canada) have increased in popularity. Among lesser-used treatments, movement classes have shown notable gains in popularity since 2003. Overall, these findings provide more evidence that spa-goers are increasingly willing to explore new spa experiences, expanding beyond the conventional treatments of Swedish massage, manicure/pedicure/facial and sauna/steam bath.

Average Spa-goer Profile

We conclude this chapter by presenting a profile of the typical, or "average," spa-goer based on a compilation of the statistically most common (modal) characteristics exhibited by spa-goers, as follows. For example:

> While many spa-goers are male (31% of U.S. spa-goers, 29% of Canadian spa-goers), the typical spa-goer is female (69% U.S., 71% Canada), non-minority (85% U.S., 70% Canada) and in her early to mid 40s (average age of spa-goers in both countries is approximately 44). She has been going to spas for over a year, but not as long as 9 years (60% U.S., 55% Canada) and her first spa visit was to a day spa (49% U.S., 60% Canada)…On that first visit, she had a body massage (68% U.S., 45% Canada) or facial (13% U.S., 20% Canada). Over time she's added other services, especially manicure (57% U.S., 54% Canada, receiving it in the past year), pedicure (56% U.S., 52% Canada) and deep tissue massage (48% U.S., 33% Canada).

Planning for Spa Use

Prevalence of Spa Travel

U.S. spa-goers are more likely to visit a spa while traveling than are their Canadian counterparts. While nearly two-thirds (63% or 20.3 million) of U.S. spa-goers visited a spa while on an out-of-town, overnight trip in the past year, not quite half (49% or 1.8 million) of Canadians did so.

Favored Spa Facility Types

Not surprisingly, resort/hotel spas are far and away the type of spa facility most favored for spa vacations; four out of five U.S. spa travelers and almost three-quarters of Canadian travelers visited a resort/hotel spa. The next most popular facility type, especially among Canadians, is a day spa affiliated with, near or recommended by the place where they are staying.

Preferred Destinations

While most of the U.S. spa travelers prefer spa vacation destinations that included domestic spas, less than half of the Canadians feel the same way. Still, among both groups of travelers, domestic spas are the most popular destination choice, followed by Mexico/Caribbean.

Spa Trip Planning

Currently, most travelers who visit spas appear to plan their visits as part of their trip, but a very large minority does not. Roughly one-third of those who go to spas while traveling have not taken a planned spa vacation in the past two years, despite having been to a spa while traveling in the past year.

Motivations for Visiting Spas

U.S. and Canadian consumers agree on the four top reasons for which they go to a spa: relieving stress, reducing stress, soothing sore joints/muscles, and feeling better about oneself. But U.S. spa-goers are more likely than Canadians to cite stress reduction, while Canadians are more likely than Americans to select the following reasons: feel better about myself, improve my appearance, contribute to overall wellness, and recover from injury. Gender accounts for many differences in the reasons given for going to spas. Men are much more likely than women (especially in Canada) to mention physical ailments as a reason for going to spas. Women are more likely to be working on their appearance or self-confidence and some are just looking for an opportunity to get away with friends.

Benefits Sought from Spa Vacations

The three most important benefits sought by spa-goers who visit spas while traveling are to relax/relieve stress, get a break from one's day-to-day environment, and be pampered. Thus, the key spa drivers among travelers are related to escape and indulgence rather than "work."

Hindrances to Increased Usage

In both the U.S. and Canada, spa consumers cite expense and time constraints as the main reasons they don't go to spas more often. A range of secondary factors are also invoked, but these reasons do not prevent as many from going to spas as perceived cost and lack of time. Interestingly, day spa consumers are especially likely to regard expenses as a problem Men and older spa-goers are more likely to feel they go to spas often enough already. And although cost is a consideration for nearly all spa-goers (especially those in the Mid-level and Periphery), it plays a role in the decisions of more female spa-goers than male spa-goers.

Advance Times for Planning Visit

We find considerable variation in how far ahead consumers start planning their spa visits, but are able to highlight some of the most common advance times, depending on the type of spa and the spa-goer's gender. For example, U.S. spa-goers are more likely to begin planning a day spa visit 4-7 days prior to visiting, while Canadian spa-goers consumers either 2-3 days or 1-2 weeks prior to visiting day spas. Women, especially in Canada, tend to plan their spa visits farther in advance than do men.

Views on Spa Costs

Opinions on the costs of spas are remarkably similar across countries. Solid majorities of U.S. and Canadian consumers agreed with the statement that "I can see spending the money on spa treatments occasionally, but they're too expensive for me to purchase regularly."

Spending Alternatives

While most spa-goers cite the cost of spas as the major factor limiting their spa use, spa visits are also cited as the most enticing activity on which spa consumers would like to spend discretionary money. Sizable minorities of U.S. and Canadian spa-goers also valued dining, shopping and travel.

Attitudes Toward Spas

Interest in Innovative Spa Types

U.S. and Canadian consumers are remarkably similar in the assessments of various innovative spa types. The three most enticing types (in terms of the percentage of consumers at least "Fairly interested") are home visit ("house call") spa, family-oriented spa and country club spa. As would be expected, there are considerable differences across age in the interest in some types of specialty spas – in every instance, youth drives interest.

Benefits Sought by Spa Consumers

When presented with a list of possible benefits sought (or highly valued) on most spa visits, U.S. and Canadian spa-goers concur on the top five benefits they seek: relaxation, calm/quite/peacefulness, pampering, time out for themselves, and refreshment. Canadian consumers are significantly more likely than U.S. consumers to seek/value the following qualities: energized, maintaining appearance, journey and rebirth. Women have much better notions of what they're seeking; females in both countries tended to select more benefits than did men. But one benefit is significantly more valued by men in both countries: physical therapy.

Effectiveness of Marketing Options

U.S and Canadian spa consumers are remarkably similar in reacting to marketing options to increase spa visits. In both countries, the three most effective marketing strategies – gift certificates, advertised sales and complimentary bonus services – will be more effective when used for day spas and least effective when used for "other" spas. In Canada, this pattern also holds true for offering complimentary accessories.

Trusted Information Sources

When seeking information on which spas to visit, consumers (in both countries) are most likely to trust friends, followed by family members and coworkers. Interesting differences across countries are that Canadians spa consumers are more likely than Americans to trust doctors and local newspapers for spa information, while Americans are more likely than Canadians to trust travel magazines.

Use of Spas

Spa Treatments

Treatments Most Often Experienced

While U.S. and Canadian spa consumers have similar patterns in terms of the type of treatment experienced within the past year, there are differences in terms of the frequency and timing of such treatments. For example, while U.S. and Canadian spa-goers share the same set of most popular treatments (Swedish full-body massage, facial, manicure and pedicure), for each of these treatments U.S. spa-goers are more likely to have experienced it multiple times in the past year.

Consumer Familiarity with Treatments

When asked to indicate which spa treatments they have "sufficient knowledge [of] to know what to expect," spa consumers rank particular treatments (in terms of familiarity) with striking consistency across the two countries. But overall, U.S. spa consumers know – or at least claim to know – more about spa treatments than do their Canadian counterparts. One exception: Canadian spa consumers are more likely (than U.S. consumers) to be familiar with energy work (e.g., Reiki, reflexology).

Treatments: Familiarity vs. Exposure

It turns out that some types of treatments are better known than actual exposure would suggest, particularly in the U.S. Such findings help to identify treatments that are relatively familiar to spa-goers who have yet to participate in them and thereby present plausible areas of potential growth in customer use. For example, two and a half times as many U.S. spa-goers profess familiarity with lifestyle classes as have actually participated in such classes. Other treatments showing unexpectedly high familiarity (given their actual participation rates) in the U.S. are body scrub/wrap and hot stone massage. Only one treatment type shows a similar pattern of having much greater familiarity than exposure in Canada: lifestyle classes.

Interest in Untried Treatments

Even among consumers who have not yet experienced them, there is substantial interest in trying some of the most popular treatments, especially Swedish full-body massage, hot stone massage, sauna/steam bath, deep tissue massage and shiatsu massage.

Treatments: Familiarity vs. Additional Interest

Naturally, spa-goers often show interest in spa services they have never experienced. By assessing the percentage of spa-goers who are very interested in receiving a particular service that they have yet to experience (especially in comparison to the percentage of spa-goers who have already experienced the service), it is possible to identify services with potential opportunities for additional usage. On that basis, the strongest candidates for expansion are Thai massage, hot stone massage and couples massage.

Interest in Medical Spa Treatments

Canadians show somewhat more experience with medical treatments, as well as more interest in trying them, than do their American counterparts. While interest in chemical peels/facials and microdermabrasion are about equally prevalent in the two countries, Canadians show somewhat more interest than do Americans in natural weight loss, laser hair removal, cellulite treatments and photofacial rejuvenation.

The Spa Experience

Importance of Customer Service

Regardless of country or spa type, the most important aspect of customer service for spa consumers is the availability of convenient treatment times. But there are differences as well. Staff hospitality and treatments starting on time are more important among day spa goers than with other spa types, especially in the U.S. Also, staff expertise and credentials are more important (across all spa types) among Canadian consumers than in the U.S.

Importance of Amenities and Features

Clearly the most important amenity or feature for spa consumers in both countries, regardless of spa type, is the atmosphere (ambience) in the spa. Among less vital features, Canadian consumers show more interest in a spa being eco-friendly than do U.S. consumers.

Importance of Products and Services

The three products or services that are most important to spa consumers (regardless of country or spa type) are the quality of products used in services, a wide range of available treatments and the ability to customize any treatment. Interestingly, Canadian spa-goers tend to identify more products and services as "essential" than do Americans, regardless of spa type, suggesting that Canadians have higher standards for their spa-going experiences.

Typical Accompanying Parties

Generally, spa consumers in both countries most often go to spas alone; an exception is when Americans visit resort/hotel spas: they are more likely to be accompanied by a spouse or domestic partner. Overall, spa-goers who don't visit alone are most likely accompanied by at least one close female friend (day spas) or a spouse or domestic partner (other spas).

Time Spent at a Spa

Naturally, the amount of time spent on a spa visit will differ significantly depending on the type of spa, but also, in some instances, by the consumer's country. One interesting finding is that Canadians have a tendency to stay longer on day spa visits than do their American counterparts.

Purchasing of Spa Products

The percentage of spa-goers who have bought, or plan to buy, particular spa products only at establishments *other than a spa* is highest for bath products and body care products. The percentage of spa-goers purchasing a particular type of spa product at *both a spa and elsewhere* is quite low.

Teenagers' Use of Spas

The estimated number of spa-goers who are quite young – teenagers – is considerable: nearly four million (3.9 million) in the U.S. and over half a million (.6 million) in Canada. In both countries, the most common treatments received by teenaged spa-goers are the most popular treatments of spa-goers overall: manicure/pedicure, full body massage and facial. Overall the range of treatments received by teenagers is more diverse in Canada than in the U.S.

Introduction

I

As a follow up to the *ISPA 2004 Consumer Trends Report: Variations & Trends on the Consumer Experience*, the International SPA Association commissioned The Hartman Group to conduct quantitative and qualitative research to gain greater understanding of spa-going consumers in the US and Canada. The current report – *ISPA 2006 Spa-goer Study: U.S. and Canadian Consumer Attitudes and Spa Use* – represents the third in a trilogy of these recent ISPA-sponsored examinations of the spa industry.

Previously, ISPA in partnership with the Canadian Tourism Commission funded a study of U.S. and Canadian spa travelers (consumers who visit spas while traveling away from home), resulting in a 2006 report entitled *Identifying the Spa Traveler: A Look at US and Canadian Consumer Attitudes and Motivators for Spa Vacations*.

More recently, The Hartman Group conducted qualitative research to provide a comprehensive look at consumer perceptions and expectations of spas across spa type and consumers' intensity of participation in the spa "world." In order to understand product consumption as well as services, particular attention was given to understanding consumer perceptions of spa products in the spa environment. Given that spa-going is not a mainstream feature of North American life, non-spa-going consumer lifestyles were also explored to shed light on the underlying barriers to spa involvement. The findings are presented in the report *ISPA 2006 Consumer Report: Spa-goer and Non-Spa-goer Perspectives.*

The current report provides a quantitative counterpart to the *Consumer Report*. By analyzing the online survey responses from over 3600 spa-goers in the U.S. and Canada, quantitative researchers at The Hartman Group describe common demographic, behavioral and attitudinal characteristics of spa-going consumers and their spa experiences. Throughout the report, attention is also paid to differences across countries and spa-goers' demographics, particularly those of gender and age.

Objective

The main objective of the survey research is to gain a better understanding of the spa-goer in the U.S. and Canada. It answers the following basic questions:

- Who is the spa-going consumer?
- What do they want/expect?
- What are they doing at spas?
- Where are they going?
- Why are they going to spas?

In addition to these questions, the research also quantifies other key spa behaviors:

- The extent of information use for planning purposes
- The most important triggers and barriers to visiting a spa
- The most popular treatments
- Interest in unique spa locations and medical treatments
- Use of spas while traveling away from home[2]

Methodology

Two different survey methodologies were utilized for this research. An omnibus telephone survey to measure prevalence of spa use was conducted in September of 2005. Shortly after the telephone survey (December of 2005), a separate online survey of active spa-goers was fielded to gauge attitudes toward spas and use of spa products and services.[3] The combination of these two methodologies, telephone interviewing and online surveying, provides a robust picture of spa use among Canadian and U.S. consumers.

[2] See *Identifying the Spa Traveler: A Look at US and Canadian Consumer Attitudes and Motivators for Spa Vacations* (2006). For additional information, contact ISPA or Canadian Tourism Commission.

[3] Active spa-goers are defined as spa-goers who have received spa services while visiting at least one spa within the past 12 months.

The omnibus telephone survey, whose main purpose was to provide data to estimate the current incidence of spa use, randomly sampled 2063 U.S. and 2001 Canadian households. Respondents were asked if they had ever gone to a spa[4] and, for those who had, whether they had gone to a spa within the past 12 months and what type of spa they had visited last. This information was used to determine incidence and to develop sampling weights to correct for the targeted sampling.

The online survey targeted active spa-goers, meaning that only spa-goers who had been to a spa within the past 12 months were included. A sample of 1909 Canadian and 1707 U.S. spa-goers was drawn for this survey. The active spa-goers were asked about their attitudes toward spas and their spa-going behavior.

To qualify as a spa-goer for the online sample, respondents had to have gone to a spa and received at least one spa treatment other than (or in addition to) a manicure or pedicure. This latter restriction excludes incidental visits where the actual spa experience is so limited that it is virtually nonexistent. By focusing on active spa-goers, we ensure the results pertain to consumers with varied but non-trivial use of spas.

Consumers who have not been to a spa in the past 12 months were excluded from the online survey. The survey research reported here is only a part of the full study of current spa-goer experiences. In addition to this research, The Hartman Group also conducted in-depth ethnographic and qualitative research, which included interviews with consumers who have not been to a spa or who no longer go to spas. The purpose of the survey research was to provide a profile of the spa-goer and, to that end, did not survey consumers who are not active users of spas.

The U.S. and Canadian spa-goer samples were drawn independently; however, both samples received the same survey within the same time period.[5] Thus, the results for the two countries are fully comparable. In general, we find that most of the results are virtually the same for both countries. Because of this general commonality between the two countries, the bulk of the presentation will focus on describing patterns irrespective of country. Still, there are some differences between Canadian spa-goers and spa-goers from the U.S., and these differences are noted where relevant. That is, discussion of the findings will proceed as if results were not gathered separately for the two countries unless specific differences between them warrant drawing attention.

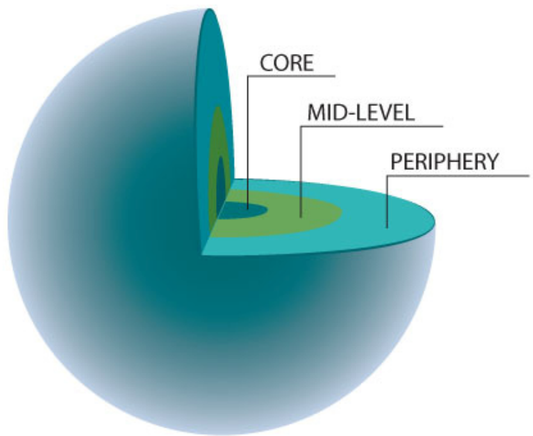
[4] In identifying spa-goers, we defined a "spa" as "an establishment that offers at least two of the following three kinds of services: full body massage, skincare treatments (such as facials), and body treatments (such as hydrotherapy or body wraps and scrubs)."
[5] For further details on the sampling design, see Appendix I

Participation in the Spa World

The World Model

One objective of this research was to gain a better understanding of the use of spas according to the level of involvement in the spa world. The notion of a "world" of activity comes from a generalized model of consumer behavior designed to understand the attitudes and behaviors of consumers engaged in a given set of activities.[6] In this case, the set of activities are those we generally associate with spas, and the "world of spas" is a shorthand way of referring to all of the individuals and businesses that use, maintain, manage, support or otherwise deal with spas.

Not all consumers participate in the spa world to the same degree. There are consumers at the Periphery who primarily seek indulgent and cosmetic services to make them feel special and look beautiful. At the other end of the spectrum are Core spa-goers who view cosmetic services as superficial and approach spas with more therapeutic ends in mind. The world of spas encompasses the full range of participation from Core to Periphery.



Spa-goers at the Core, Mid-level and Periphery

Periphery Spa-goers

On the Periphery of the spa world are consumers who have little serious attachment to the world of spas and are generally very price sensitive, which may prevent them from trying services not aimed at improving appearance. Their experience of spas is rather limited and they tend not to associate their visits to spas with a health or wellness agenda. Their level of participation in the spa world is essentially peripheral to the central or "Core" values, attitudes, behaviors and sensibilities that define the spa world.

[6] For discussion of how a "world" perspective informs marketing research, see Appendix III.

Meet Jeff, A Periphery Spa Consumer

- First visit to a spa was with his wife (on *her* request) for their anniversary – it has since become an annual massage ritual
- Flinches about price when buying shampoo or soap anywhere except Costco
- Is thinking about getting his mom a certificate for her birthday, wants her to "treat herself"
- Hasn't told any of his friends that he's been to a spa

Mid-level Spa-goers

Between the extremes of the Core out to the Periphery of the spa world is where we find the majority of spa-goers. This Mid-level to the spa world is characterized by spa-goers looking to blend their wellness and spa-going behaviors. In contrast to the Core spa-goer, however, Mid-level spa-goers strive to strike a balance between pure pampering and transformative mind, body and spirit experiences. There are limits to what they will spend on untried services, because their larger objective is to escape rather than work on themselves.

Meet Kim, A Mid-level Spa Consumer

- Tries to visit a spa once every three months to keep her "life in balance"
- Has recently begun booking multiple treatments at each visit
- Questions the authenticity of a spa if she isn't offered a cup of tea and a plush robe upon entering
- Schedules appointments with reputable therapists that are referred by friends and co-workers

Core Spa-goers

Participation at the Core of the spa world generally means incorporating spa visits into a more comprehensive or holistic wellness regime. While they are not above indulgences, for these spa-goers, the spa experience is intended primarily to "get work done," to transcend the merely physical and address the mind and spirit as well. Their agenda is such that price takes a back seat to qualities of the spa setting, training of the staff and overall ambiance. Note that luxury is *not* what Core spa-goers are seeking. Rather, they want every experience from arrival to departure orchestrated to carry them seamlessly through a process of rejuvenation or self-improvement.

Meet Gretchen, A Core Spa Consumer

- Considers regular spa-going an integral part of her health and wellness routine
- Spends significant time perusing the spa menu and is fairly experimental with services
- Seeks out indigenous treatments and products for personal integration and use
- Posted spa menus of her favorite places on the bulletin board at her office

Overview of the Spa-Going Consumer Population

II

Prevalence of Spa-goers

In both the U.S. and Canada, about one quarter of adult consumers has visited a spa.[7] Based upon results from the omnibus telephone survey, we estimate that 26% of consumers from the U.S. and 25% of Canadians have ever been to a spa (Figure 1).[8] These sample percentages translate into roughly 57 million U.S. adults (aged 18 and older) and 6.3 million Canadian adults.

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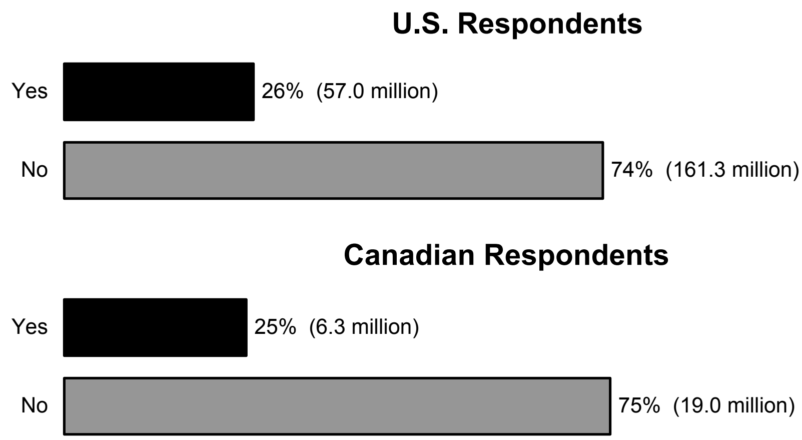
[7] For this estimate, a "spa" is defined as "an establishment that offers at least two of the following three kinds of services: full body massage, skincare treatments (such as facials), and body treatments (such as hydrotherapy or body wraps and scrubs)."

[8] The omnibus telephone surveys of consumers in the U.S. and Canada were conducted in September 2005. The U.S. omnibus survey contained a national sample of 2063 adult Americans. The Canadian omnibus survey contained a national sample of 2001 adult Canadians. All subsequent findings (regarding spa-goers) in the current report are based on an online survey designed specifically for this study (for additional information on our online survey, see Appendix I).

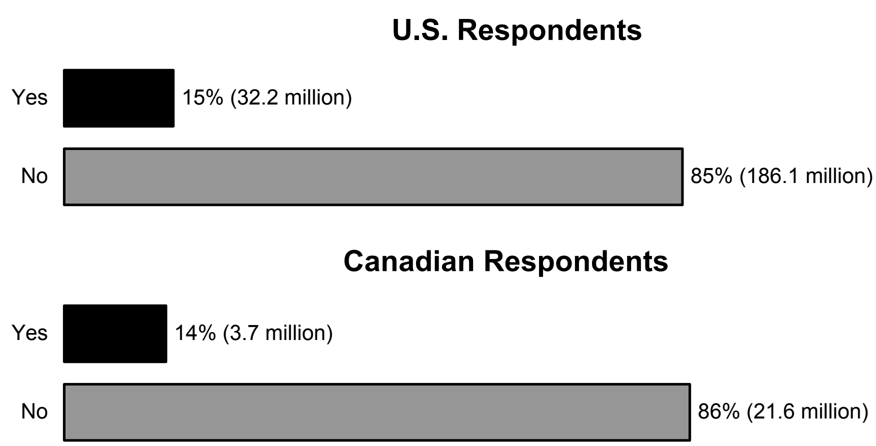
Figure 1
Have You Ever Visited a Spa?



Note: Estimated number of adult consumers shown in parentheses.
Sources: U.S. results based on 2063 respondents; Canadian results based on 2001 respondents.

At the time of the survey, 58% of the Canadians and 57% of the U.S. consumers who had ever been to a spa indicated going to one in the past 12 months. Put differently, 15% of all Americans and 14% of all Canadians had visited a spa within the previous 12 months (Figure 2). These active spa-goers, representing 32.2 million U.S. consumers and 3.7 million Canadian consumers, are the focus of this study.

Figure 2
Have You Visited a Spa in the Past 12 Months?

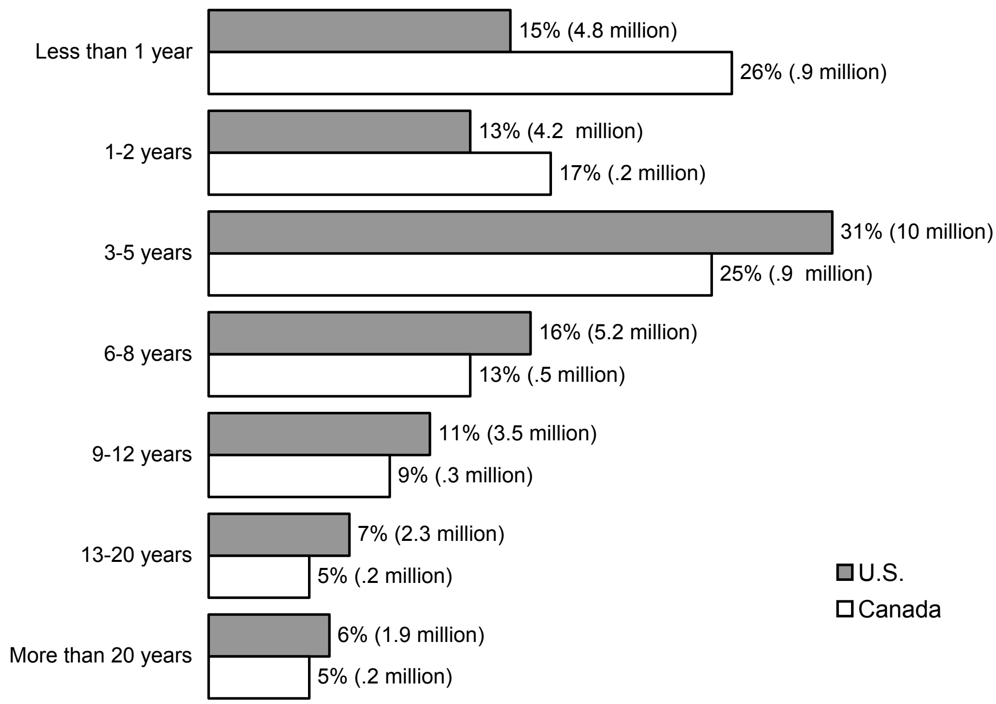


Note: Estimated number of adult consumers shown in parentheses.
Sources: U.S. results based on 2063 respondents; Canadian results based on 2001 respondents.

Duration as a Spa-goer

U.S. spa-goers have on average been going to spas longer than their Canadian counterparts (Figure 3). While 71% of U.S. spa-goers have been going to spas for at least 3 years, only 57% of Canadians make that claim. And while only 15% of U.S. spa-goers are newcomers in their first year of spa-going, a full one-quarter (26%) of Canadian spa-goers are in their first year.

Figure 3
How Long Have You Been Visiting Spas?



Note: Estimated number of active spa-goers shown in parentheses.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Duration as a Spa-goer: Gender Differences

Although women are much more likely than men to go to spas, there is essentially no difference between male and female spa-goers in terms of how long they have been going to spas. The men who do go to spas appear to have been going to spas as long as the women who go, which suggests that any increase in use of spas by men has been balanced by a similar increase in use by women.

Duration as a Spa-goer: Age Differences

Notably, in the U.S., but not Canada, there is a sizable portion (15%) of older users (ages 55 and over) who are long-time spa users, visiting spas for more than 20 years. In fact, just over one-quarter (26%) of older users in the U.S. have been visiting spas for at least 13 years. Conversely, 21% of older users in Canada report going for the first time in the past year.

Duration as a Spa-goer: Differences by Spa Type

How long spa-goers have been visiting spas is less about gender or age and more about the kinds of spas visited. When U.S. spa-goers were asked how long they have been going to spas, the most common answer was "3-5 years." However, this answer was especially prevalent among day spa-goers (i.e., spa-goers who last visited a day spa). Other notable findings are that (1) resort/hotel spa-goers are more likely to report going for the first time, and (2) consumers of other types of spas are much more likely to be long-time consumers of spas (i.e., for over 20 years). Further analysis shows that this is primarily true of consumers who last visited club spas (29% are long-time goers) or cruise ship spas (16% are long-time goers).

Aging and Spa Use Over Time

Table 1 lists the percent of spa-goers at different ages from 18 to 65 and over.[9] The data for 2003 show a younger population of spa-goers than the data for 2005. This alone would suggest that the consumers visiting spas in 2003 are still with us in 2005, having aged a few years, and that younger consumers are not coming in at the same rate as in 2003. In short, the picture presented by these data comparisons is one of a relatively static group of consumers visiting spas.

[9] The earlier (2003) data included respondents aged 16 and 17, which slightly lowers the average age of the sample, but has little effect on the age distribution between the two sample years.

This impression, however, is an artifact of the lack of comparison points from earlier periods. If we go back to 1999, we discover that the average age of spa-goers was 46.6, essentially the same age as in 2005.[10] Rather than a set group of spa-goers aging, which would have put the average age in 1999 closer to 37, it would appear that spa use is being fed by a steady stream of new consumers such that the average age remains fixed to the early 40s.

Table 1
Age of Spa-goers, 2003 and 2005

	U.S. Residents		Canadian Residents	
	2003	2005	2003	2005
18 – 24	*14%**	*11%*	*5%**	*10%*
25 – 34	*28%*	*19%*	*24%*	*20%*
35 – 44	*23%*	*22%*	*27%*	*25%*
45 – 54	*15%*	*24%*	*24%*	*20%*
55 – 64	*10%*	*14%*	*11%*	*13%*
65 and over	*10%*	*10%*	*10%*	*12%*
Average age	*40.8*	*44.4*	*43.8*	*44.5*

*** Lowest age group was 16-24 in 2003.**
Sources: 2003 U.S. results based on 1201 respondents, 2005 U.S. results based on 1707 respondents; 2003 Canadian results based on 481 respondents, 2005 Canadian results based on 1909 respondents.

If the spa-going population is continually being refreshed by the addition of younger consumers as others leave the spa world, then the question arises as to why older consumers exit. Is the spa experience less relevant to consumers as they age? Perhaps age is coincidental to the typical timing of exposure to the spa world. In other words, initiation into the world may, for whatever reason, happen much more readily after consumers reach their 30s. If the typical spa-goer only remains active in the spa world for ten to fifteen years, regardless of when they begin, there would be a natural fallout from the late 40s on among those who started in their 30s. Thus, the observed pattern may have little to do with age per se, but a consequence of the fact that consumers do not become interested in the spa experience until they hit 30. This, in turn, could be a result of targeted marketing or cultural practices recognizing “milestone” birthdays (i.e., turning 30) and other social drivers (e.g., re-connecting with friends, transitioning from job-building to career-building, seeking relief from family and work demands, etc.).

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[10] *ISPA 1999 Spa-goer Study*.

Impediments to Going to Spas: Age Differences

- Given the age distribution of spa-goers shown in Table 1, it seems highly unlikely that the spa experience is relevant only to a narrowly defined age range. Instead, the more likely explanation for the lack of change in the average age is that most consumers participate in the world of spas for a finite period rather than remain involved indefinitely from the time they first start going to spas.
- Notably, we find that some impediments to spa-going actually decline in significance as the individual gets older, a sign of increasing experience and knowledge. For example, not knowing what to expect at a new spa is a common concern among the youngest spa-goers, but negligible among the oldest spa-goers in the U.S.
- Concerns about the conveniences of time and location tend to increase in middle age, then drop off among the oldest spa-goers. Older spa-goers are more likely restricted by lack of interest.
- In summary, these findings suggest the challenge is not that of increasing the relevance of spas for consumers at different ages, but of sustaining long-term interest once relevance is established.

Spa Types

Description of Spa Types

This study presents seven primary types of spas common in North America. For purposes of presenting results, we have usually classified these types into three general categories of spa: day, resort/hotel and other. Survey respondents were provided the following descriptions of the seven spa types:

Day Spa

A day spa offers a variety of spa services, including facial and body treatments on a day-use-only basis. Overnight accommodations are not provided.

Resort/Hotel Spa

A resort/hotel spa offers spa, fitness and wellness services, as well as spa cuisine menu choices and overnight accommodations within a resort or hotel.

Destination Spa

A destination spa is not part of another resort or hotel. The destination spa's primary purpose is guiding individual spa-goers to healthy lifestyles. Historically an extended stay, this transformation can be accomplished by a comprehensive program that includes spa services, physical fitness activities, wellness education, healthful cuisine and special interest programming.

Medical Spa

A spa in which full-time, on-site licensed health care professionals provide comprehensive medical and wellness care in an environment that integrates spa services, as well as traditional, complimentary and/or alternative therapies and treatments. The facility operates within the scope of practice of its staff, which can include both aesthetic/cosmetic and prevention/wellness procedures and services.

Club Spa

A facility whose primary purpose is fitness and that offers a variety of professional administered spa services on a day-use basis. A hotel, gym or fitness club that has a sauna, steam or whirlpool bath is **not** a spa unless it explicitly offers spa products and services as an added benefit.

Mineral Springs Spa

A spa offering an on-site source of natural mineral, thermal or seawater used in hydrotherapy treatments.

Cruise Ship Spa

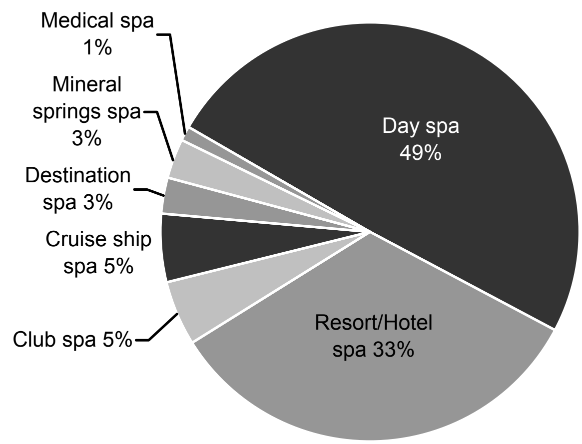
A spa aboard a cruise ship providing professionally administered spa services, fitness and wellness components and spa cuisine menu choices.

Gateway Spas

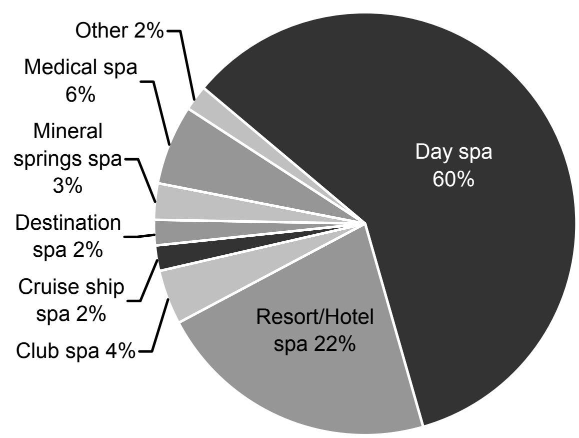
Spa-goers in both countries typically enter the spa world through day spas; 49% of U.S. consumers and 60% of Canadian consumers initially visited a day spa (Figure 4). Notable differences between countries are that U.S. consumers are more likely than Canadian consumers to experience a resort/hotel spa as their first spa (33% and 22%, respectively), while at least some Canadians (6%) first go to a medical spa, a pattern currently almost non-existent in the U.S.

Figure 4
What Type of Spa Did You First Visit?

U.S. Respondents



Canadian Respondents

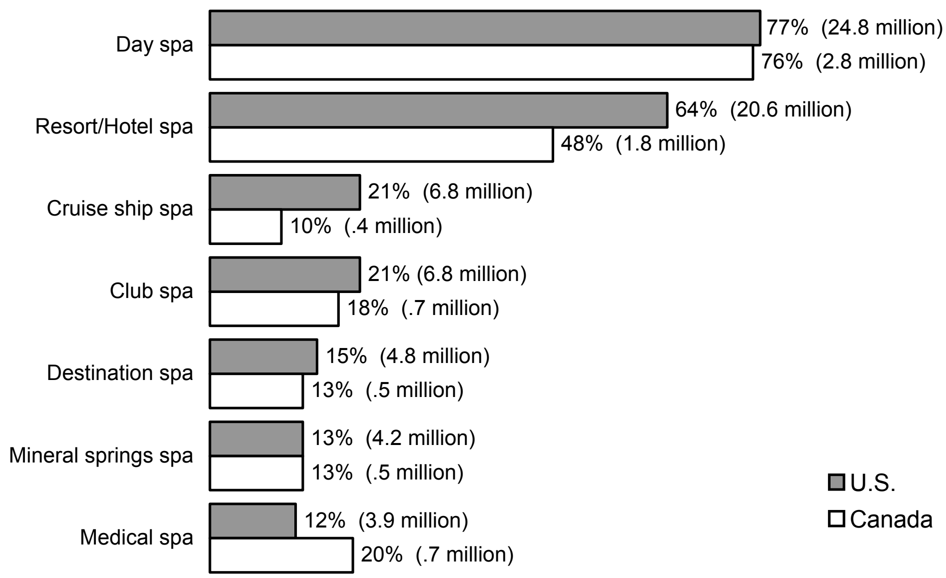


Note: Percentages may not total to exactly 100% due to rounding.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Spa Types Visited

Of these seven different spa types, day spas are the most popular in both the U.S. and Canada, while resort/hotel spas also enjoy considerable use by consumers. Just over three-quarters of spa-goers in both the U.S. and Canada reported visiting a day spa in the past year (Figure 5). The second most popular spa type in both countries is clearly the resort/hotel spa, though it is more popular among U.S. spa consumers (64% of spa-goers visited one in the past year) than among Canadians (48%). Among the remaining spa types, cruise ship spas are more popular among U.S. spa-goers (21% vs. 10% of Canadian spa-goers), while medical spas have a larger following among Canadians (20% of spa-goers) than in the U.S. (12%).

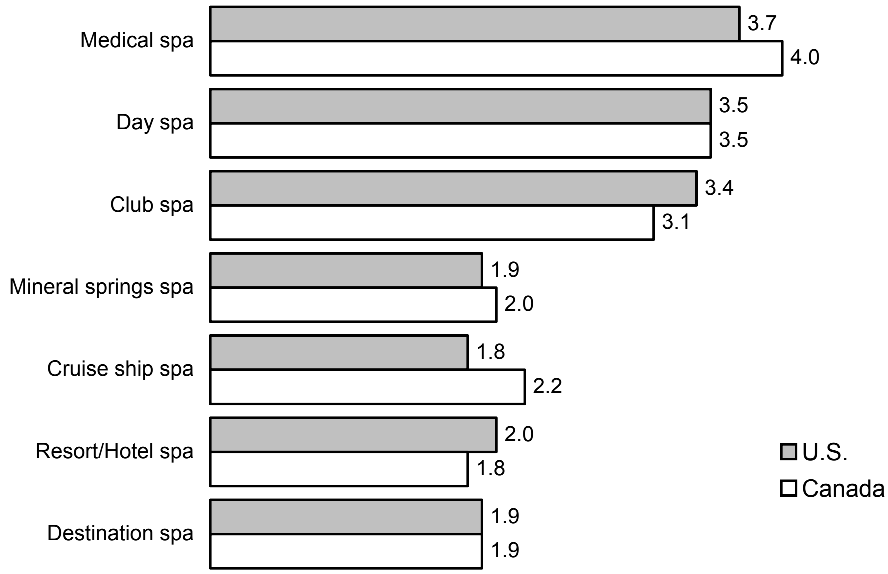
Figure 5
In the Past 12 Months…Have You Visited the Following Places?



Note: Estimated number of active spa-goers shown in parentheses.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

While some spa types (e.g., day spas and resort/hotel spas) are visited by a substantial portion of the spa-going population, spa-goers that do visit particular types of spas may differ in the frequency of their visits, as shown in Figure 6. Here we see that medical spas and club spas, while not necessarily frequented by many spa-goers, are nevertheless visited as often as day spas by those who do go to these kinds of spas.

Figure 6
Average Number of Spa Visits in the Past 12 Months (By Spa Type)



Note: Average number of visits only by those who made at least one visit. Means calculated with estimated values derived from interpolation of range-based answers (e.g., "2-3 times" was replaced by 2.5, "4-6 times" replaced by 5, etc.).
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Type of Spa Last Visited

Another way to compare the popularity of spa types is to assess which type of spa has been visited more recently by each respondent. Using this classification, day spas are again clearly the most popular type of spa in both the U.S. and Canada. (Patterns of spa types visited are very similar for the two countries.) Just over half (52%) of the survey's U.S. respondents and 59% of its Canadian respondents reported day spas as the spa type they most recently visited (Table 2). And again, the second most popular spa type is undoubtedly resort/hotel spas, visited most recently by just over a quarter of both U.S. and Canadian spa-goers. Among the remaining spa types, U.S. spa-goers tend to favor cruise ship spas (with 8% visiting most recently), while Canadians prefer medical spas (6%).

Table 2
Type of Spa Visited Most Recently

	U.S. Residents	Canadian Residents
Day spa	52%	59%
Resort/Hotel spa	27%	28%
Cruise ship spa	8%	2%
Club spa	5%	2%
Medical spa	3%	6%
Destination spa	2%	1%
Mineral springs spa	2%	2%

Note: Percentages may not total to exactly 100% due to rounding.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Recent Changes in Types of Spas Visited

Compared to 2003, spa visits to club spas have fallen sharply among spa-goers in both countries (Table 3). In 2003, a much greater percentage of spa-goers went to club spas than did in 2005. Interestingly, the drop in club spa visits was made up by visits to others kinds of spas in differing ways in the U.S. and in Canada. Canadian spa-goers increased (by four times) their propensity to visit resort/hotel spas. U.S. spa-goers, on the other hand, favored day spas while in Canada spa-goers decreased their day spa visits. In addition, U.S. spa-goers decreased their use of medical spas while Canadians were increasing their use. Thus, the shifts in spa use over the past couple of years have followed quite different paths in the two countries, despite many similarities in the attitudes and other behaviors of spa-goers in Canada and the U.S.

Table 3
Last Type of Spa Visited in Past 12 Months, 2003 and 2005

	U.S. Residents		Canadian Residents	
	2003	2005	2003	2005
Day spa	35%	52%	68%	59%
Resort/Hotel spa	25%	27%	6%	28%
Cruise ship spa	7%	8%	—	2%
Club spa	17%	5%	18%	2%
Medical spa	9%	3%	2%	6%
Destination spa	2%	2%	1%	1%
Mineral springs spa	5%	2%	5%	2%

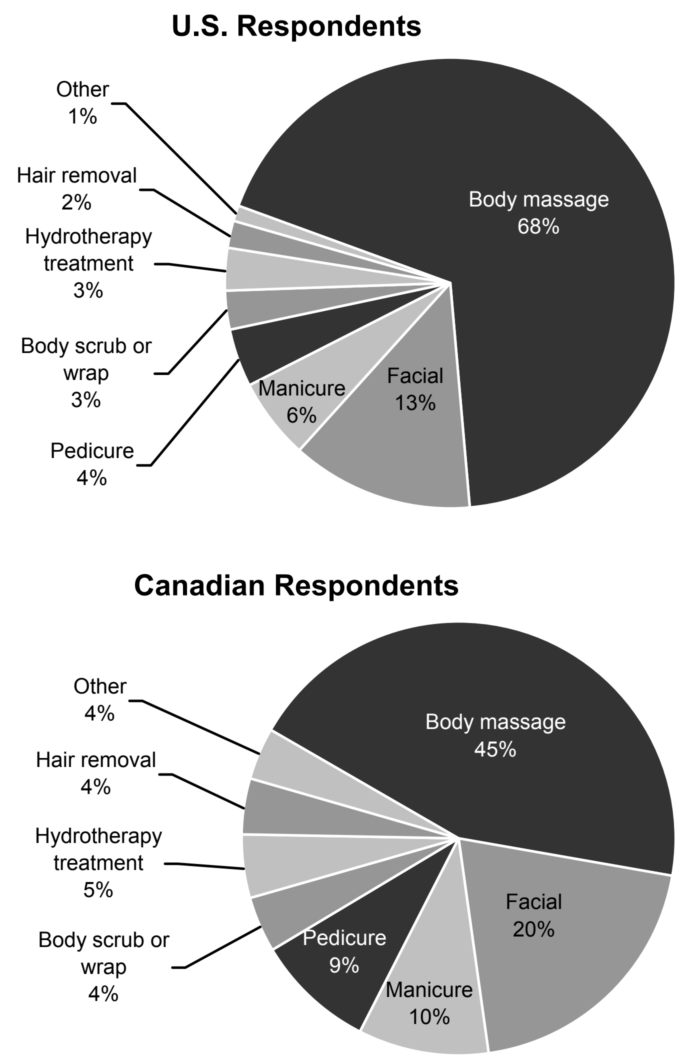
Note: Percentages may not total to exactly 100% due to rounding.
Sources: 2003 U.S. results based on 1201 respondents, 2005 U.S. results based on 1707 respondents; 2003 Canadian results based on 481 respondents, 2005 Canadian results based on 1909 respondents.

Spa Services

Gateway Spa Services

Body massage is the most common spa treatment initially experienced by spa-goers, but this is much more true in the U.S. (where 68% of spa-goers experienced it first) than in Canada (45%) (Figure 7). In fact, while two types of treatment (body massage and facial) accounted for four-fifths (81%) of the gateway treatments of U.S. spa-goers, they accounted for just under two-thirds (65%) of gateway treatments among Canadian consumers. Manicures and pedicures are about twice more likely to be gateway treatments for Canadians than for U.S. consumers.

Figure 7
What Was the First Spa Treatment You Ever Received?



Note: Percentages may not total to exactly 100% due to rounding.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

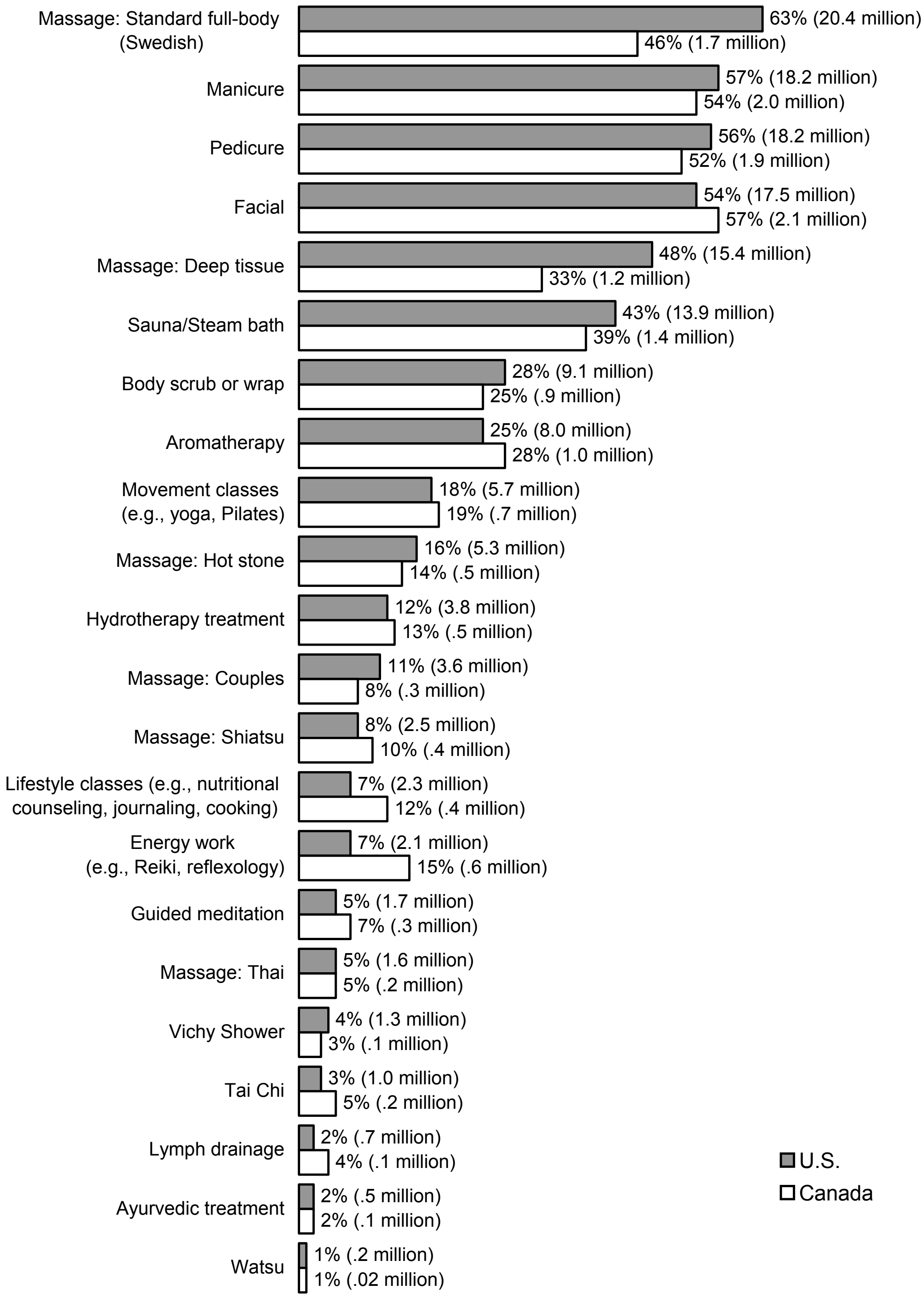
Gateway Spa Services: Gender Differences

The differences between men and women in the *first* services received follow what we would expect from gender stereotypes for such services. That is, women are much more likely to have started out with spa services to enhance their appearance, focusing on those elements (e.g., face and hands) that are most often on display. More to the point, these services are indicative of the typical entry point into the spa world and demonstrate that men are more likely to have started at the Mid-level, while a significant percentage of women began at the Periphery.

Spa Services Experienced

In large part, the popularities of specific spa treatments are strikingly similar in both countries. The six most popular spa services (though not necessarily in the same order) in both countries are standard full-body (Swedish) massage, manicure, pedicure, facial, deep tissue massage and sauna/steam bath (Figure 8). But Swedish massage is more popular in the U.S., where nearly two-thirds (63%) of U.S. spa-goers (over 20 million in number) received one in the past year, compared to under half (46%) of Canadian spa-goers (1.7 million in number). Other notable differences are that deep tissue massage is more popular in the U.S. than in Canada, while energy work (such as Reiki and reflexology) enjoys more popularity in Canada than in the U.S.

Figure 8
Which Services Have You Experienced in the Past Year?



Note: Estimated number of active spa-goers shown in parentheses.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Spa Services Experienced: Gender Differences

- A number of spa services are utilized by spa-goers of one gender more often than by the other. Not surprisingly, in both the U.S. and Canada, female spa-goers are much more likely than men to receive manicures, pedicures and facials.
- Conversely, while men visit spas in lower numbers than do women, those who do go are (in both countries) more likely than female spa-goers to have received a Thai massage (10-11% of men vs. 3% of women).
- And Canadian men don't stop there. Among Canadian spa-goers, men are also more likely than females to experience Tai Chi and the following additional types of massages: Swedish full-body, deep tissue, Shiatsu and couples. (Same-sex couples notwithstanding, this last finding – Canadian male spa-goers being more likely than female spa-goers to receive couples massage – might seem odd until one realizes that we're comparing a larger percentage of a smaller pool – male spa-goers – with a smaller percentage of a larger pool – female spa-goers. The actual *numbers* of men and women receiving couples massage are approximately equal.)
- These results are consistent with the traditional cultural emphases placed on women's appearance and men's performance. Because women typically devote more time and effort than men to managing their outward appearance, it is not surprising to find them more often taking advantage of spa services oriented to those parts of the body that are typically "on stage." Conversely, male spa-goers (at least those in Canada) are more likely to explore various forms of healing massage and the martial art of Tai Chi.
- Still, society in both countries is giving greater recognition to men's appearance and we would expect spa treatments designed to enhance men's appearance to hold greater growth potential, so long as marketing these treatments to men does not suggest an overtly feminine spa experience.

Spa Services Experienced: Age Differences

- There are also significant differences in use of spa treatments by age. Grouping spa-goers into three age groups (ages 18-34, 35-54 and 55-over), we find that in both countries, the utilization of couples massage decreases significantly with age. The percentage of those experiencing couples massage decreases in the U.S. from 15% among 18-34 year olds to 12% of 35-54 year olds to 5% of those 55 and older, and in Canada from 10% among 18-34 year olds and 9% of 35-54 year olds to 2% of those 55 and older.
- Conversely, older U.S. spa-goers (those 35 or over) are significantly more likely than younger users to attend lifestyle classes.
- In Canada, middle-aged spa-goers (those aged 35-54) are significantly more likely than other age groups to choose deep tissue massage, while older spa-goers (aged 35 and over) are more likely than younger users to engage in energy work.
- We hesitate to attribute all of these differences to something inherent in the aging process, since some of them are apparent in only one country. If aging truly influenced participation in these services, then we would expect to find similar patterns in both countries. Instead, it seems more likely that cultural (and possibly marketing) differences between the two countries explain these differences better than do the effects of aging.

Knowledge of Spas and the Spa Experience

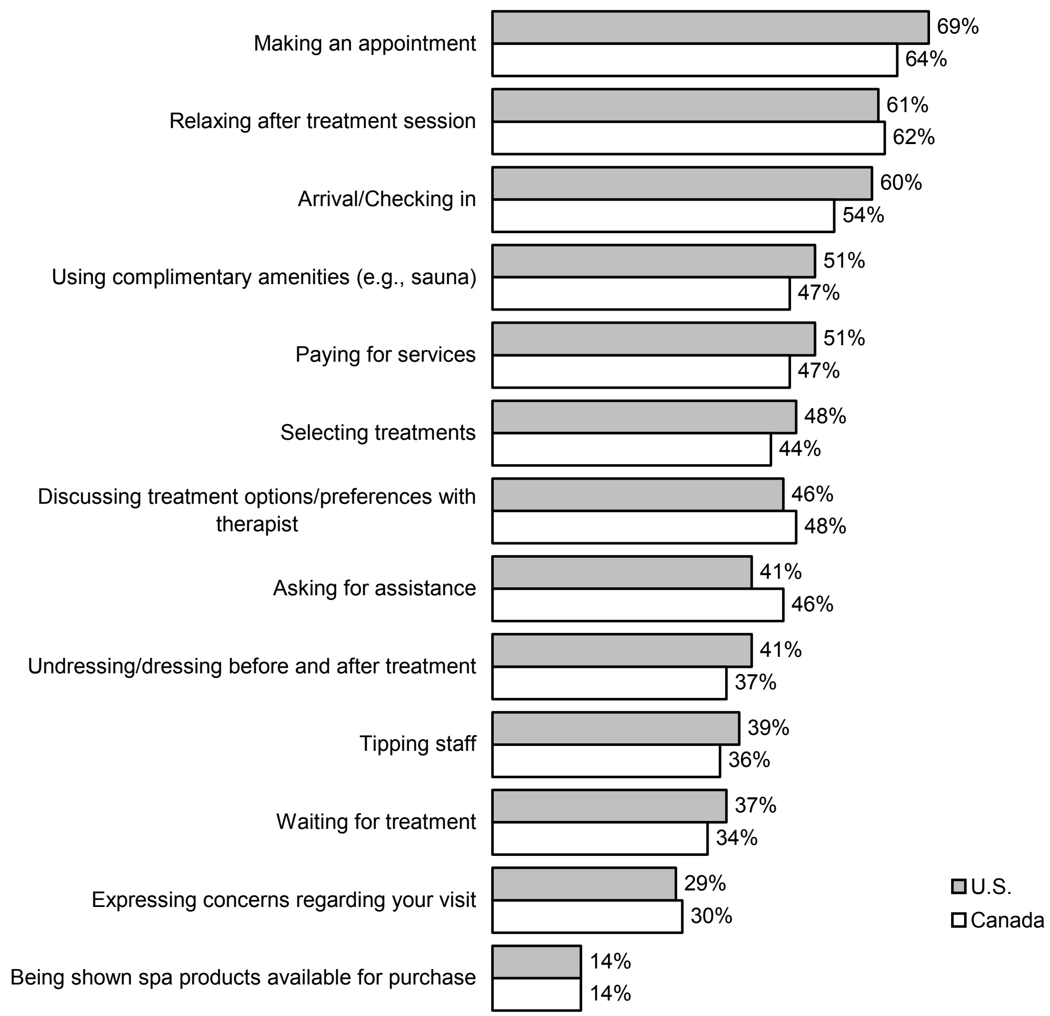
As spa-goers acquire more knowledge of the Spa World – such as developing a sense of how to behave properly during a spa visit – their experiences can become increasingly comfortable. But so far, some aspects of the spa experience have remained uncomfortable to many spa-goers, as shown in Figure 9. Chief among these is being shown spa products for purchase; fewer than 15% of U.S. or Canadian spa-goers are comfortable during this. Other areas of situations commonly uncomfortable (in both countries) are expressing concerns regarding a visit and waiting for a treatment.

Interestingly, these three aspects represent very different situations. Being shown products for purchase makes spa-goers uncomfortable because it injects a commercial transaction into an altogether different kind of experience. For many spa-goers, the cold, rational calculus of barter and exchange is completely at odds with the indulgent, escapist or transformative experience sought from a spa visit.

Waiting for a treatment poses a somewhat different dilemma; namely, what to do and for how long. For those who have not become familiar with the transition between arrival and treatment, waiting becomes a big unknown. For the most inexperienced spa-goers, waiting for a treatment is akin to waiting for any other appointment, whether it is at a doctor's office, a hair salon or a bank. Rather than use this stage of the spa experience to prepare for the treatment emotionally and spiritually (i.e., to transition from the day-to-day), these spa-goers find themselves just "killing time."

Finally, the need or desire to express one's concerns about a spa visit is yet another uncomfortable situation for most spa-goers. Rather than voice such concerns, most spa-goers make assumptions about what is and is not proper behavior at the spa, and suffer in silence. Consumers generally have trained themselves to get through situations that are awkward or uncomfortable and, rather than raise concerns, determine never to return. In this instance, it may mean never returning to a particular spa or, if the concern is general, never returning to any spa. That most consumers are well trained to disguise dissatisfaction or discomfort in unfamiliar social situations makes it all the more difficult for staff to recognize anything is amiss. Consequently, creating a structured way to allay concerns early in the spa experience could be very valuable.

Figure 9
Being Extremely/Very Comfortable with Aspects of the Spa Experience



Percentages of respondents who feel "Extremely comfortable" or "Very comfortable" (results based on answers on a 5-point scale ranging from "Extremely comfortable" to "Not at all comfortable."). Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Recent Changes in Use of Spa Services

Differences in how the 2003 and 2005 surveys define some treatments (the 2005 survey tended to use more inclusive definitions) prevent us from making precise comparisons in the use of some spa treatments. For example, Americans' use of massage appears to have increased regardless of which definition you use (requiring Swedish massage specifically or any of several types of massage) in 2005, but the change in Canadians' use of massage *does* depend on which definition is used (Table 4). Still, some indicators are clear enough to conclude that the use of some types of treatments increased – often substantially – from 2003 to 2005. In particular, manicures, pedicures, facials and sauna/steam baths have all grown in popularity. Also, body scrubs/wraps (especially in the U.S.) and aromatherapy (especially in Canada) have increased in popularity. Among lesser-used treatments, movement classes have shown notable gains in popularity since 2003. Overall, these findings provide more evidence that spa-goers are increasingly willing to explore new spa experiences, expanding beyond the conventional treatments of Swedish massage, manicure/pedicure/facial and sauna/steam bath.

Table 4
Treatments Purchased in Past 12 Months, 2003 and 2005

	U.S. Residents		Canadian Residents	
	2003	2005	2003	2005
Massage	*58%*	*63%*[1] *85%*[1]	*58%*	*46%*[1] *68%*[1]
Manicure	*31%*	*57%*	*32%*	*54%*
Pedicure	*27%*	*56%*	*43%*	*52%*
Facial	*30%*	*54%*	*37%*	*57%*
Sauna/Steam bath	*27%*	*43%*	*25%*	*39%*
Body scrub or wrap	*12%*[2]	*28%*	*15%*[2]	*25%*
Aromatherapy	*17%*	*25%*	*13%*	*28%*
Movement classes	*5%*[3]	*18%*	*8%*[3]	*19%*
Hydrotherapy treatment	*6%*[4]	*12%*	*8%*[4]	*13%*
Vichy Shower	*2%*[5]	*4%*	*6%*[5]	*3%*

[1] Top number: Defined as standard full-body (Swedish) in 2005; Bottom number: Defined as any massage (among standard full-body, couples, deep tissue, hot stone, Shiatsu and Thai) in 2005.

[2] Defined as only body scrub in 2003.

[3] Defined as yoga in 2003.

[4] Defined as hydrotherapy bath in 2003.

[5] Defined as hydrotherapy shower in 2003.

Sources: 2003 U.S. results based on 1201 respondents, 2005 U.S. results based on 1707 respondents; 2003 Canadian results based on 481 respondents, 2005 Canadian results based on 1909 respondents.

Average Spa-goer Profile[11]

To conclude this chapter, we present one particular way to summarize the various facets of information on spa-goers: by presenting a profile of the typical, or "average," spa-goer based on a compilation of the statistically most common (modal) characteristics exhibited by spa-goers, as follows.

[11] See Table 5 for more detailed information characterizing the typical spa-goer.

While many spa-goers are male (31% of U.S. spa-goers, 29% of Canadian spa-goers), the typical spa-goer is female (69% U.S., 71% Canada), non-minority (85% U.S., 70% Canada) and in her early to mid 40s (average age of spa-goers in both countries is approximately 44). She has been going to spas for over a year, but not as long as 9 years (60% U.S., 55% Canada) and her first spa visit was to a day spa (49% U.S., 60% Canada). Although she usually visits a day spa when she goes to a spa (77% U.S., 76% Canada), this average spa-goer also uses resort or hotel spas on occasion (64% U.S., 48% Canada). On that first visit, she had a body massage (68% U.S., 45% Canada) or facial (13% U.S., 20% Canada). Over time she's added other services, especially manicure (57% U.S., 54% Canada, receiving it in the past year), pedicure (56% U.S., 52% Canada) and deep tissue massage (48% U.S., 33% Canada). Her main reasons for going to spas are to alleviate stress (77% U.S., 65% Canada) and soothe sore joints and muscles (38% U.S., 35% Canada), but sometimes a trip to the spa is just to make her feel better about herself. While she does go to spas with close female friends, most of the time she goes alone (69% U.S., 74% Canada), and her usual spa visits only last 1-2 hours (65% U.S., 62% Canada). This spa-goer tends to be married (60% U.S., 51% Canada), has a college degree (81% U.S., 63% Canada) and above average ($50K+) household income (85% U.S., 66% Canada).

The average male spa-goer resembles the average spa-goer with a few important differences. For one, he is more likely to have gotten introduced to the spa world through a visit to a resort/hotel spa (49% U.S., 35% Canada) than a day spa (28% U.S., 34% Canada). Likewise, the average male spa-goer has less use for facials, manicures and pedicures. By far, the main service for men is the Swedish full-body massage (91% U.S., 85% Canada). Although handling stress is still the main draw, men are more likely than women to cite reasons such as injury recovery and overall wellness than improving appearance. Visiting resort/hotel spas means that the average male spa-goer is more likely than the average female spa-goer to spend two or more days at a spa. Men are also much more likely to be accompanied by their spouse when they make spa visits (50% U.S., 46% Canada). This makes sense for visits to a resort/hotel spa, but it also holds true for men who frequent day spas (35% of men in the U.S. who go to day spas, and 39% of men in Canada who go to day spas, go with their wives). Lastly, the average male spa-goer is older and has higher educational attainment and household income than the average female spa-goer.

Table 5
Characteristics of the Average Spa-goer (By Gender)

	U.S.			Canada		
	Total	Male	Female	Total	Male	Female
	100%	31%	69%	100%	29%	71%
How long have you been visiting spas?						
Less than 1 year	15%	18%	15%	16%	26%	25%
1-2 years	13%	14%	12%	17%	20%	16%
3-5 years	31%	28%	32%	25%	22%	27%
6-8 years	16%	15%	17%	13%	16%	12%
9-12 years	11%	7%	14%	9%	7%	10%
More than 12 years	13%	18%	11%	10%	9%	11%
First spa visited						
Day spa	49%	28%	59%	60%	34%	70%
Resort/Hotel spa	33%	49%	25%	22%	35%	16%
Club spa	5%	8%	4%	4%	7%	2%
Cruise ship spa	5%	5%	5%	2%	4%	2%
Destination spa	3%	3%	3%	2%	2%	2%
Mineral springs spa	3%	3%	3%	3%	5%	2%
Medical spa	1%	1%	1%	6%	9%	4%
Spas visited in the past 12 months						
Day spa	77%	56%	87%	76%	57%	83%
Resort/Hotel spa	64%	74%	59%	48%	67%	41%
Club spa	21%	32%	16%	18%	24%	15%
Cruise ship spa	21%	29%	18%	10%	17%	7%
Destination spa	15%	21%	13%	13%	18%	11%
Mineral springs spa	13%	20%	9%	13%	19%	11%
Medical spa	12%	13%	12%	20%	25%	18%
First service received on first spa visit						
Body massage	68%	84%	61%	45%	75%	33%
Facial	13%	5%	17%	20%	6%	25%
Manicure	6%	3%	7%	10%	1%	14%
Pedicure	4%	1%	5%	9%	3%	11%
Body scrub or wrap	3%	2%	3%	4%	3%	4%
Hydrotherapy treatment	3%	5%	2%	5%	7%	3%
Hair removal	2%	0%	2%	4%	1%	5%
Other	1%	1%	2%	4%	4%	3%

Table 5
Characteristics of the Average Spa-goer (By Gender)

	U.S.			Canada		
	Total 100%	Male 31%	Female 69%	Total 100%	Male 29%	Female 71%
Most common services received in the past 12 months						
Facial	54%	27%	67%	57%	27%	70%
Manicure	57%	23%	72%	54%	22%	67%
Swedish full-body massage	63%	61%	64%	46%	54%	42%
Pedicure	56%	22%	72%	52%	22%	64%
Sauna/Steam bath	43%	49%	40%	39%	51%	34%
Massage: Deep tissue	48%	53%	45%	33%	43%	29%
Reason to visit a spa						
Relieve stress	47%	45%	48%	42%	47%	39%
Reduce stress	46%	48%	45%	38%	41%	36%
Soothe sore joints/muscles	38%	42%	37%	35%	47%	31%
Feel better about myself	31%	26%	33%	42%	31%	46%
Mental/emotional health	28%	31%	27%	27%	22%	29%
Improve my appearance	22%	11%	27%	30%	13%	37%
Overall wellness	19%	21%	18%	28%	34%	26%
Recovery from injury	5%	9%	4%	11%	21%	6%
Typical spa partner						
Alone	69%	57%	74%	74%	64%	78%
Close female friend(s)	31%	5%	43%	28%	6%	37%
Spouse or domestic partner	28%	50%	18%	24%	46%	15%
Lead time for planning last spa visit						
The same day as visit	8%	9%	7%	12%	19%	10%
The day before visit	12%	18%	9%	9%	11%	7%
2-3 days prior to visit	21%	27%	19%	19%	21%	19%
4-7 days prior to visit	19%	13%	22%	20%	17%	21%
1-2 weeks prior to visit	17%	12%	19%	17%	14%	19%
2-4 weeks prior to visit	11%	8%	12%	13%	9%	14%
Over one month prior to visit	11%	13%	11%	10%	9%	10%
Length of time spent at the last spa						
Less than 1 hour	3%	1%	4%	4%	5%	4%
About 1 hour	18%	16%	19%	18%	25%	15%
About 1.5 hours	23%	24%	23%	19%	19%	19%
About 2 hours	24%	26%	22%	25%	25%	25%
About 2-24 hours	24%	18%	26%	24%	13%	29%
1 day or more	8%	14%	6%	10%	14%	9%

Table 5
Characteristics of the Average Spa-goer (By Gender)

	U.S.			Canada		
	Total 100%	Male 31%	Female 69%	Total 100%	Male 29%	Female 71%
Age						
18 - 24	11%	8%	12%	10%	9%	10%
25 - 34	19%	13%	21%	20%	17%	21%
35 - 44	22%	24%	21%	25%	24%	25%
45 - 54	24%	24%	24%	20%	23%	19%
55 - 64	14%	15%	14%	13%	13%	13%
65 and older	10%	15%	8%	12%	13%	12%
Marital status						
Married	60%	64%	59%	51%	59%	48%
Single	19%	17%	20%	18%	20%	17%
In a committed relationship	12%	9%	14%	16%	15%	17%
Widowed/Separated/Divorced	8%	10%	7%	15%	7%	18%
Education						
No college degree	19%	9%	23%	37%	31%	40%
College graduate	40%	40%	40%	38%	36%	40%
Post graduate schooling	41%	51%	37%	24%	33%	20%
Household income						
Under $50K	15%	9%	18%	34%	26%	38%
$50K-$99K	41%	34%	44%	40%	39%	40%
$100K and higher	44%	57%	38%	26%	35%	22%
Ethnicity						
African-American	2%	1%	2%			
Latino/Hispanic	2%	2%	2%			
Asian	9%	12%	8%			
Caucasian	85%	81%	87%			
Other ethnicities[a]	4%	6%	3%			
English-Canadian				70%	63%	73%
French-Canadian				7%	9%	7%
European descent				16%	16%	16%
African descent				2%	1%	2%
Asia-Pacific descent				8%	14%	6%
Other ethnicities[b]				9%	9%	9%

[a] Other ethnicities in U.S. included Native American and various submitted (write-in) identities.

[b] Other ethnicities in Canada included Aboriginal Canadian, American (U.S.) born, Middle Eastern descent and various submitted (write-in) identities.

Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

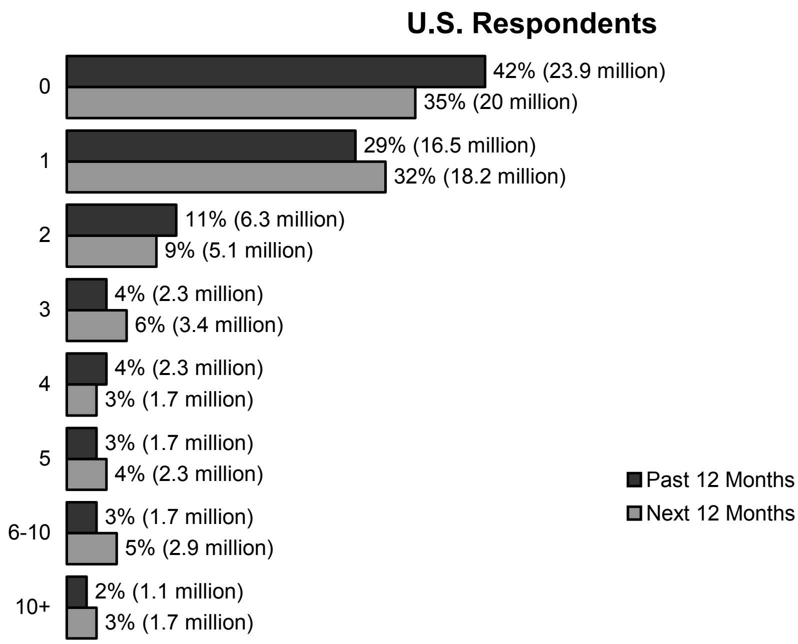
Planning for Spa Use

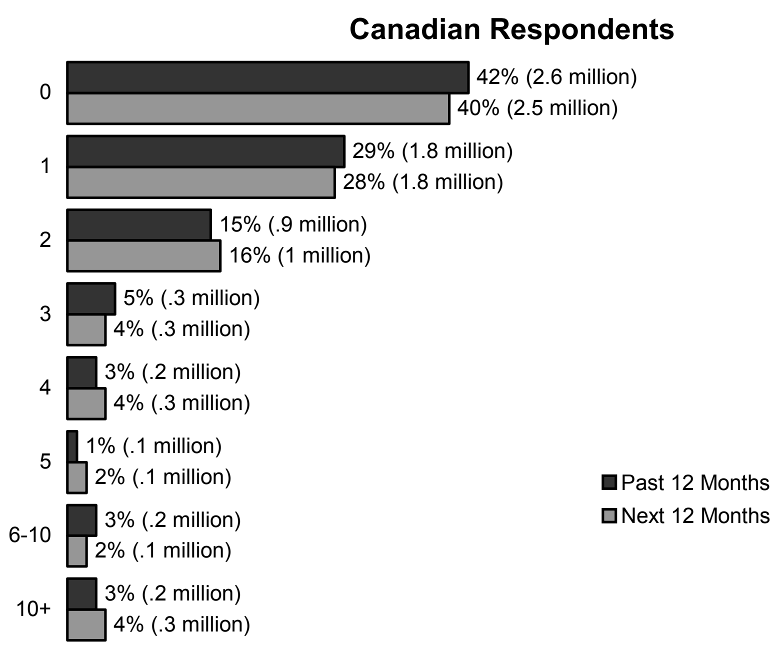
Expected Future Spa Visits

The outlook for spas appears quite positive if we look at consumers intentions for future visits. When asked how many spa visits they anticipate taking in the next 12 months, nearly two thirds of Canadian and U.S. spa-goers (60% and 62% or 3.8 million and 35.3 million, respectively) said they intend to take one or more trips to a spa.[12] These results seem promising when compared to the number of trips these spa-goers reported taking in the previous 12 months. Figure 10 below presents the number of spa visits consumers say they made in the past 12 months alongside the number of trips they intend to take in the next 12 months. Comparing these two shows that spa-goers are planning to make more visits in the coming 12 months. For example, although two out of five U.S. spa-goers (42%) did not go to a spa in the past 12 months, only about one third (35%) say they don't plan to make a visit in the next 12 months, which is a decrease of nearly 17%. The increase over the past 12 months, moreover, is not limited to those planning only one trip, but also applies to those expecting to make several spa visits in the next 12 months. A similar pattern holds for Canadian spa-goers as well.

[12] These results are taken from the omnibus telephone surveys of Canadian and U.S. consumers who had ever gone to a spa. Those who had been to a spa at some time were asked how many times they visited a spa in the past 12 months and how many times they expect to visit a spa in the next 12 months.

Figure 10
Number of Visits Made to Spas in Past 12 Months and Expected to Make in Next 12 Months





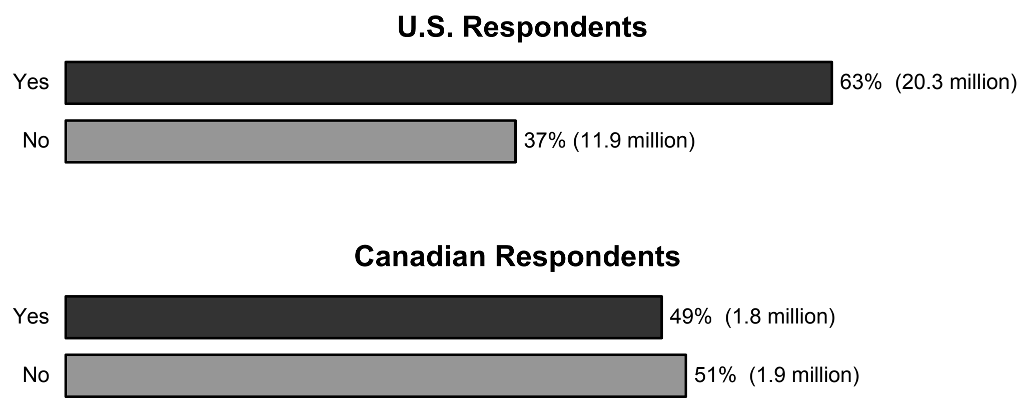
Note: U.S. percentages do not sum to 100%, due to "Don't know" responses not shown.
Sources: U.S. results based on 2063 respondents; Canadian results based on 2001 respondents.

Overall, the results suggest a modest increase in spa visits can be expected. Certainly, the differences from the past 12 months to the next 12 months for both countries indicate spa-goers are unlikely to scale back on their spa visits. What these results demonstrate is that spa-goers are definitely interested in continuing their spa experiences and that, absent any serious barriers to increasing the number of visits they can make, they fully intend to go more often.

Prevalence of Spa Travel

U.S. spa-goers are more likely to visit a spa while traveling than are their Canadian counterparts (Figure 11). In 2005, nearly two-thirds (63%) of U.S. spa-goers went to a spa when away from home, on vacation or traveling for business, while about half (49%) of Canadian spa-goers did.[13] These trips include planned spa visits as well as those in which going to a spa was not part of the original travel plans. The difference between the two countries is quite striking and suggests that Canadian spa-goers are much less likely to think of going to a spa when traveling than are their U.S. counterparts. With so many consumers (20.4 million U.S. spa-goers and 1.8 million Canadian spa-goers) taking advantage of spa services on the road, it makes sense to consider the impact that this has – or could have – on the spa industry.

Figure 11
During the Past 12 Months, Have You Ever Visited a Spa While On an Out-of-town, Overnight Vacation or Business Trip (Even If You Hadn't Intended to Visit One When Planning Your Trip)?



Note: Estimated number of active spa-goers shown in parentheses.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

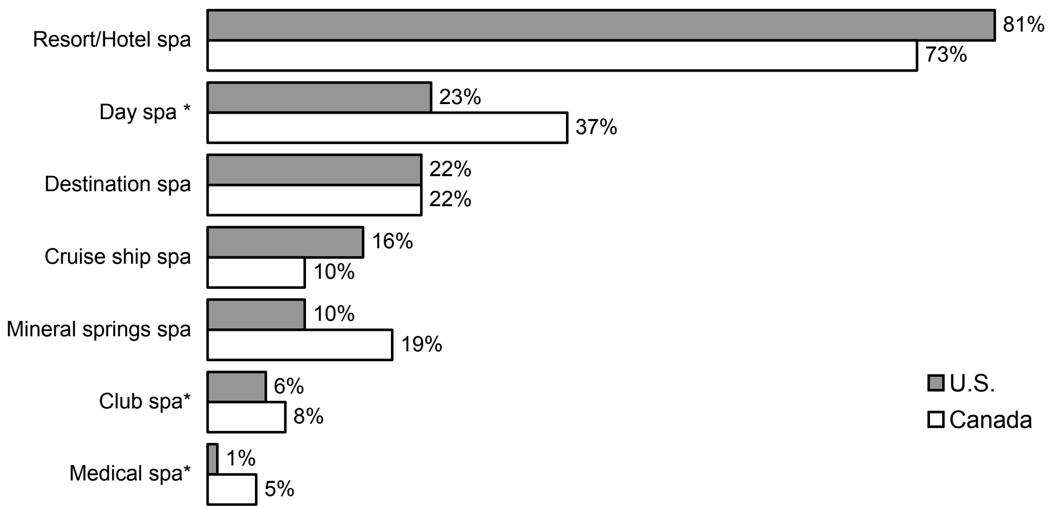
[13] *Identifying the Spa Traveler: A Look at US and Canadian Consumer Attitudes and Motivators for Spa Vacations* (2006). For additional information, contact ISPA or Canadian Tourism Commission.

Spa Visits While Traveling

Favored Spa Facility Types

Not surprisingly, resort/hotel spas are far and away the type of spa facility most favored for spa vacations; four out of five (81%) U.S. spa travelers and almost three-quarters (73%) of Canadian travelers visited a resort/hotel spa (Figure 12). The next most popular facility type, especially among Canadians, is a day spa affiliated with, near or recommended by the place where they are staying.

Figure 12
What Types of Spa Facility Did You Visit on Your Spa Vacation Trips?



* affiliated with, near or recommended by the place where you were staying

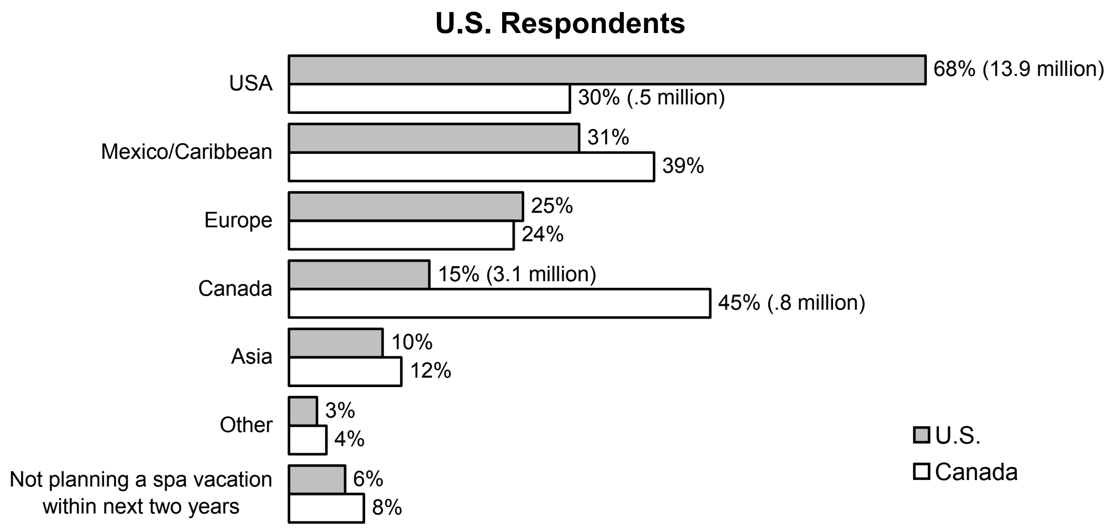
Sources: U.S. results based on 484 respondents; Canadian results based on 460 respondents.

So, not only are resort/hotel spas in a position to take advantage of the traveler wanting to visit a spa, day spas also have an opportunity. Those that have formed alliances with hotels or other lodging establishments also stand to benefit from the spa-going traveler. Indeed, given these data, those that have not partnered with others in the hospitality industry should seriously consider doing so.

Preferred Destinations

Preferences for future spa vacations show another side of the spa vacation consumer. While most (68%) of the U.S. spa travelers prefer spa vacation destinations that included domestic spas, less than half (45%) of the Canadians feel the same way. Still, among both groups of travelers, domestic spas are the most popular destination choice, followed by Mexico/Caribbean.

Figure 13
Where is Your Preferred Destination(s) for a Future Spa Vacation within the Next Two Years?

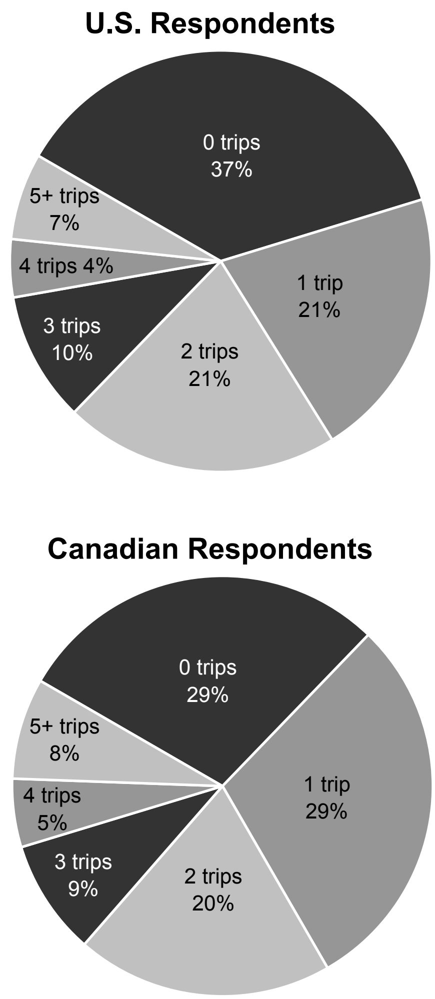


Note: Multiple selections allowed. Estimated number of active spa travelers shown in parentheses.
Sources: U.S. results based on 483 respondents who visited a spa while traveling in 2005; Canadian results based on 457 respondents who visited a spa while traveling in 2005.

Spa Trip Planning

Currently, most travelers who visit spas appear to plan their visits as part of their trip, but a very large minority does not. Roughly one-third of those who go to spas while traveling (37% of U.S. travelers and 29% of Canadian travelers) have not taken a *planned* spa vacation in the past two years (represented by "0 visits" in Figure 14), despite having been to a spa while traveling in the past year. This means many of the spa visits made by travelers are the result of decisions made after leaving home rather than during the trip planning process.

Figure 14
How Many Planned Out-of-Town, Overnight Spa Vacation Trips Have You Taken in the Past 2 Years?



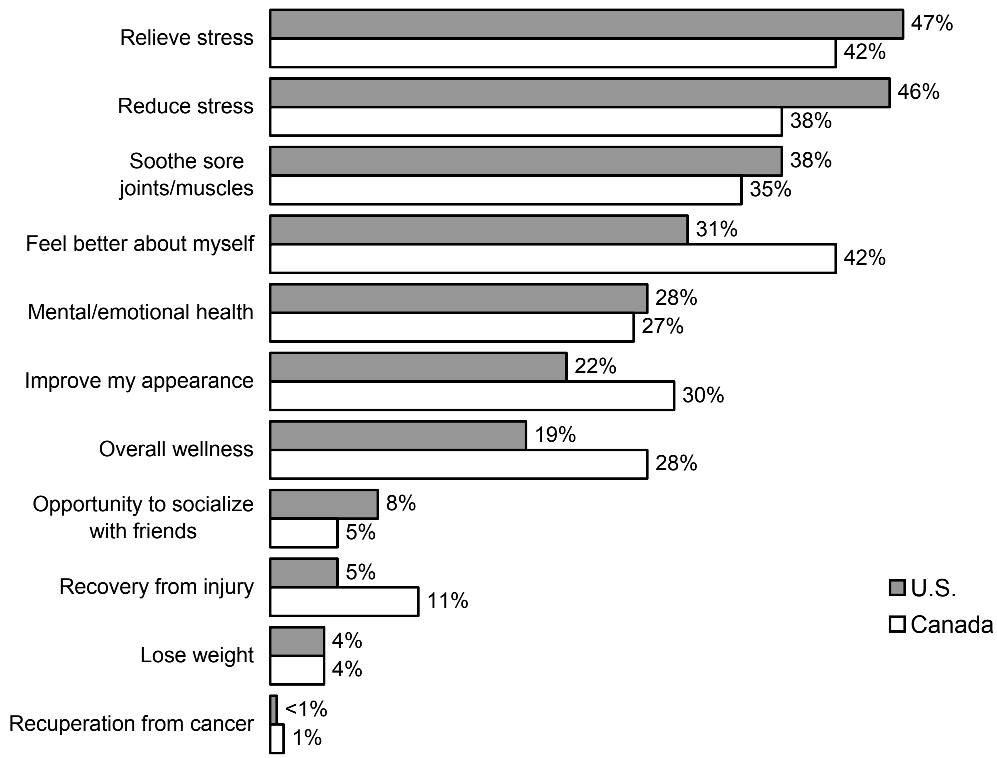
Note: This survey question was part of an optional adjunct survey administered to willing respondents who had visited a spa while traveling in the previous 12 months.
Sources: U.S. results based on 769 U.S. spa-goers who have visited a spa while traveling in the past year and who answered this optional question; Canadian results based on 652 Canadian respondents meeting the same criteria.

Capturing this *spontaneous* spa visitor presents an enormous opportunity for resort/hotel spas because their services are so conveniently located for their guests, any of whom represents a potential customer. Developing this market requires only that the resort/hotel appeal to any latent interest among its guests or provide them with an incentive to visit the spa.

Motivations for Visiting Spas

U.S. and Canadian consumers agree on the four top reasons for which they go to a spa: relieving stress, reducing stress[14], soothing sore joints/muscles, and feeling better about oneself (Figure 15). But U.S. spa-goers are more likely than Canadians to cite stress reduction, while Canadians are more likely than Americans to select the following reasons: feel better about myself, improve my appearance, contribute to overall wellness, and recover from injury.

Figure 15
Reasons Most Often Motivating You to Visit a Spa



Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Motivations Across Spa Types

When we break these findings down by spa type, we see distinct differences in motivations for visiting particular types of spas (Figure 16). In both countries, consumers visit day spas in

[14] Our survey choice of "relieve stress" was intended to convey short-term relief, while "reduce stress" would convey longer-term relief. While consumers might not make exactly the same interpretations, it is interesting to note that at least half of the respondents in each country (60% in U.S., 50% in Canada) selected one of these choices ("relieve" or "reduce") and not the other, suggesting that at least that many of them were distinguishing between these two choices in some way.

particular (i.e., more so than other spa types) for one reason: to improve their appearance.[15] (Canadian day spa consumers are also partial to "feel[ing] better about myself.")

U.S. consumers go to resort/hotel spas in particular to soothe sore joints/muscles and to improve their mental/emotional health; Canadian consumers also go to resort/hotel spas in particular to reduce stress.

Finally, consumers visit other types of spas in particular to improve their overall wellness (especially among Canadians) and to recover from injury (especially among Canadians); U.S. consumers also go to other types of spas in particular to lose weight.

Of course, findings on motivations for visiting other spa types can depend largely on the characteristics of those "other" spas. In fact, it appears that the findings regarding motivations are influenced by inter-country differences in the distribution of spa types within the "other spa" category, as well as possibly differences in how Americans and Canadians interpret the benefits of various types of spas.

For example, consider the finding that Canadian consumers are much more likely than Americans to be seeking recovery from an injury when visiting other spas (specifically, 30% of Canadian other spa goers compared to 12% of their American counterparts). Breaking that finding down by specific types of spas, we find that consumers in both countries regard medical spas as a good source for injury recovery; but since more Canadians visit medical spas, this difference in the distribution of spa usage will inflate the answer "recovery from injury" among Canadian other spa goers.

Furthermore, while about one-quarter of Canadian consumers of mineral springs spas visit them to recover from injury, almost no U.S. consumers of such spas cited that particular motivation. So it appears that differences in consumers' perceptions of the benefits of particular, perhaps less familiar, spa types are also influencing the "other spa" results.

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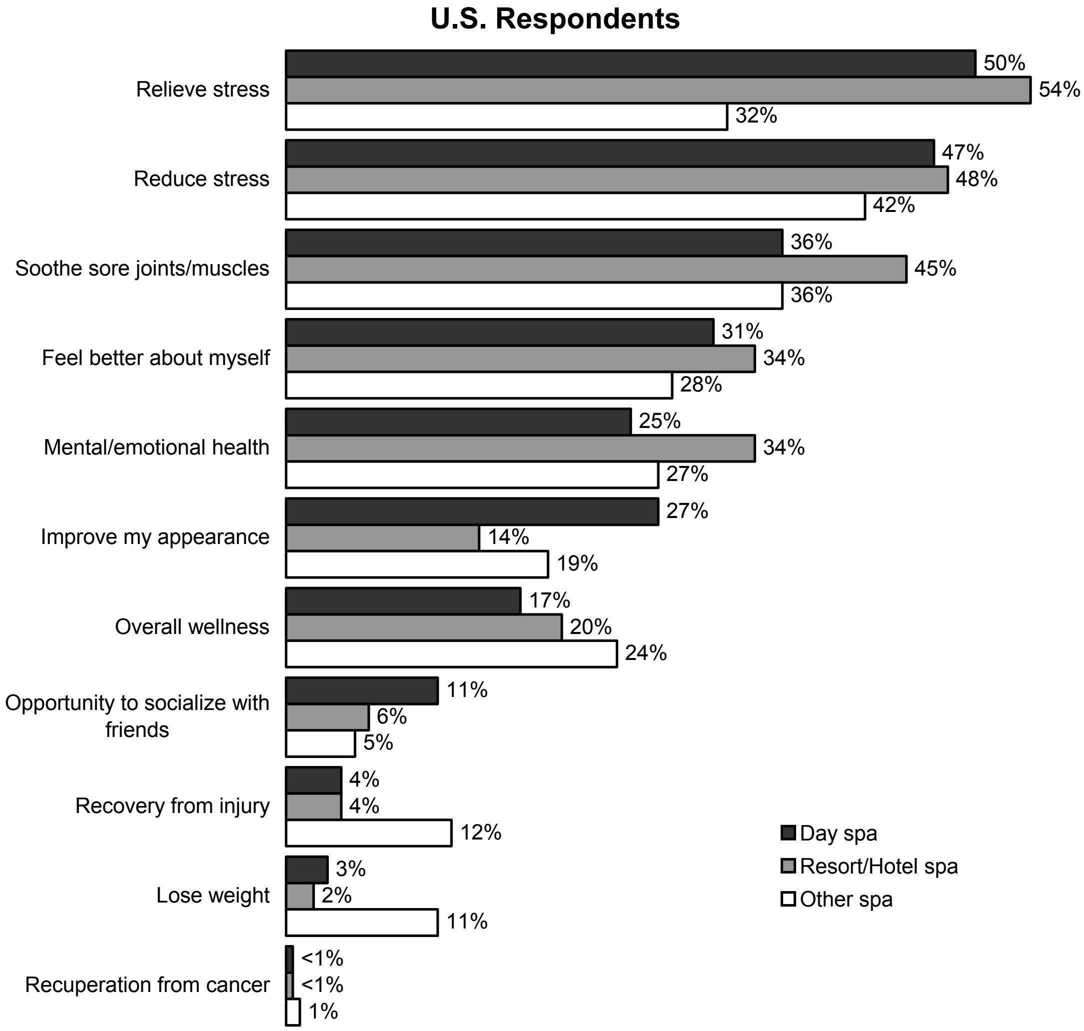
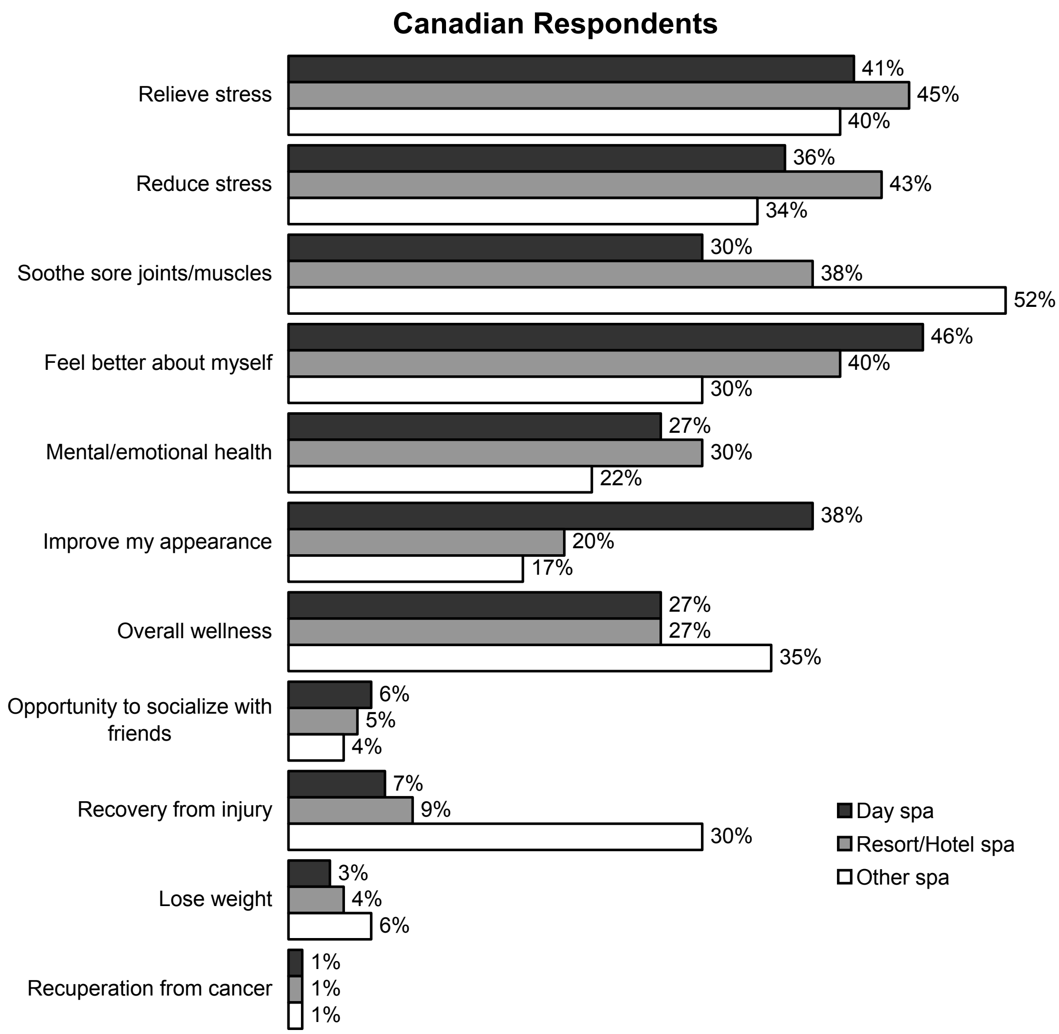
[15] These reasons reflect spa type comparisons (of percentages selecting a particular motivation) that show both (1) an absolute difference between spa types of at least 5% and (2) a proportional difference of at least 10%.

Figure 16
Reasons Most Often Motivating You to Visit a Spa (By Spa Type Last Visited)



Source: U.S. results based on 1707 respondents.

Figure 16 (continued)
Reasons Most Often Motivating You to Visit a Spa (By Spa Type Last Visited)



Source: Canadian results based on 1909 respondents.

Motivations for Visiting Spas: Gender Differences

- Gender accounts for many differences in the reasons given for going to spas. Men are much more likely than women (especially in Canada) to mention physical ailments as a reason for going to spas. Women, on the other hand, are more likely to choose entirely different reasons. They are more likely to be working on their appearance or self-confidence and some are just looking for an opportunity to get away with friends.

- These differences, regardless of position in the spa world, suggest efforts to appeal to spa-goers should take gender into account. Men are more likely to respond favorably to messages directed at their physical well-being than to ones touting other spa benefits (at least initially). While women are also interested in soothing sore joints and muscles, they are open to appeals to improve their appearance as well.

Motivations for Visiting Spas: Age Differences

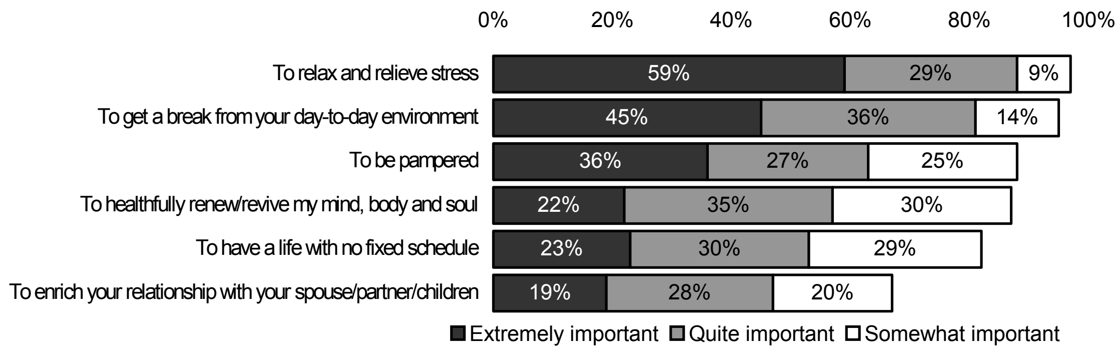
- Reasons for going to spas do not really vary much by age. In fact, the only motivation consistently related to age is to soothe sore joints/muscles. Understandably, this reason is given by a much larger percentage of older spa-goers than by younger spa-goers. In both the U.S. and Canada, the percentages citing this reason increase from just over a quarter (28%) of 18-34 year olds to just under half (45% among U.S. spa-goers, 48% among Canadian spa-goers) of those 55 and older.

Benefits Sought from Spa Vacations

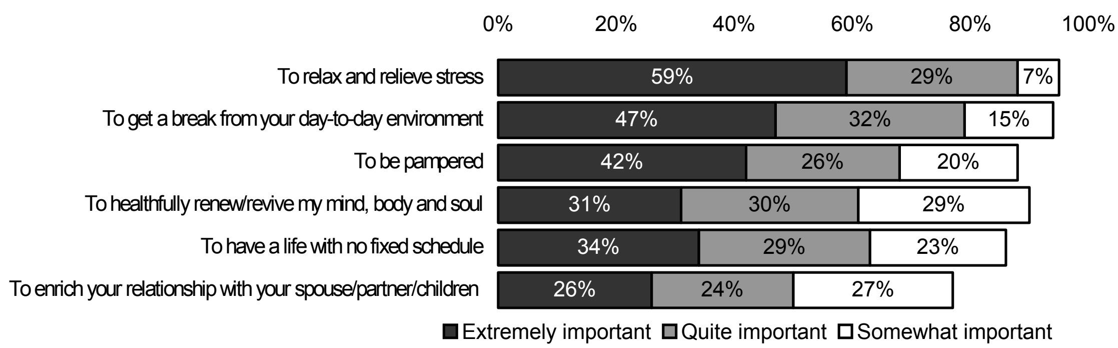
The reasons many spa-goers give for going to spas change when the spa is combined with a vacation. Interestingly, the importance of various benefits derived from spa vacations are strikingly similar for travelers from the U.S. and Canada (Figure 17). From a list of 16 benefits, U.S. and Canadian spa travelers rank the same top six benefits in the same order (in terms of the percentage of respondents deeming a benefit to be at least "somewhat important"). The three most important benefits for both groups of travelers are to relax/relieve stress, get a break from one's day-to-day environment, and be pampered. Thus, the key spa drivers among travelers are related to escape and indulgence rather than work.

Figure 17
Highest Rated Benefits on Spa Vacation Travel

U.S. Respondents



Canadian Respondents

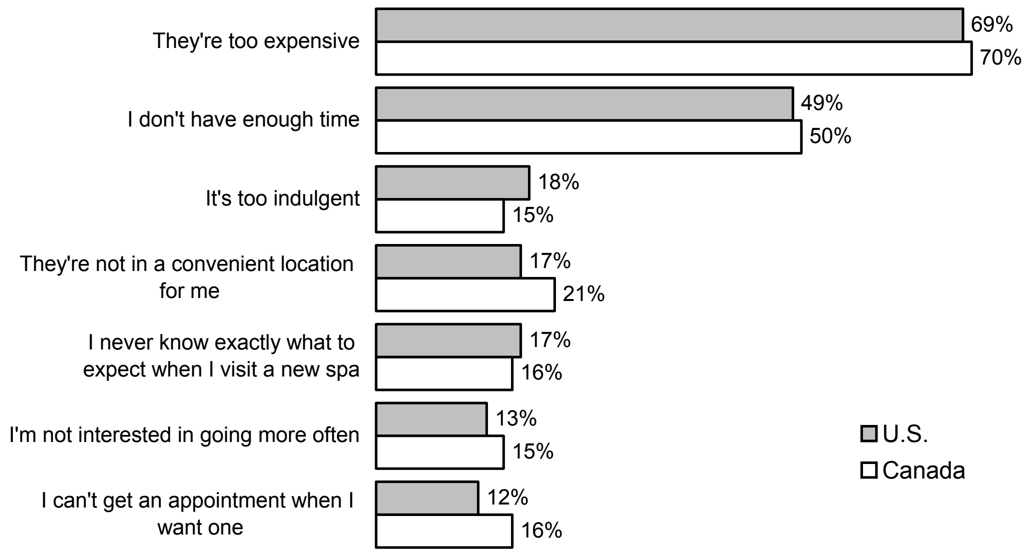


Note: Percentages for "Hardly important" or "Not at all important" omitted.
Sources: : U.S. results based on 483 respondents; Canadian results based on 457 respondents.

Hindrances to Increased Usage

In both the U.S. and Canada, spa consumers cite expense and time constraints as the main reasons they don't go to spas more often (Figure 18). A range of secondary factors are also invoked, but these reasons do not prevent as many from going to spas as perceived cost and lack of time.

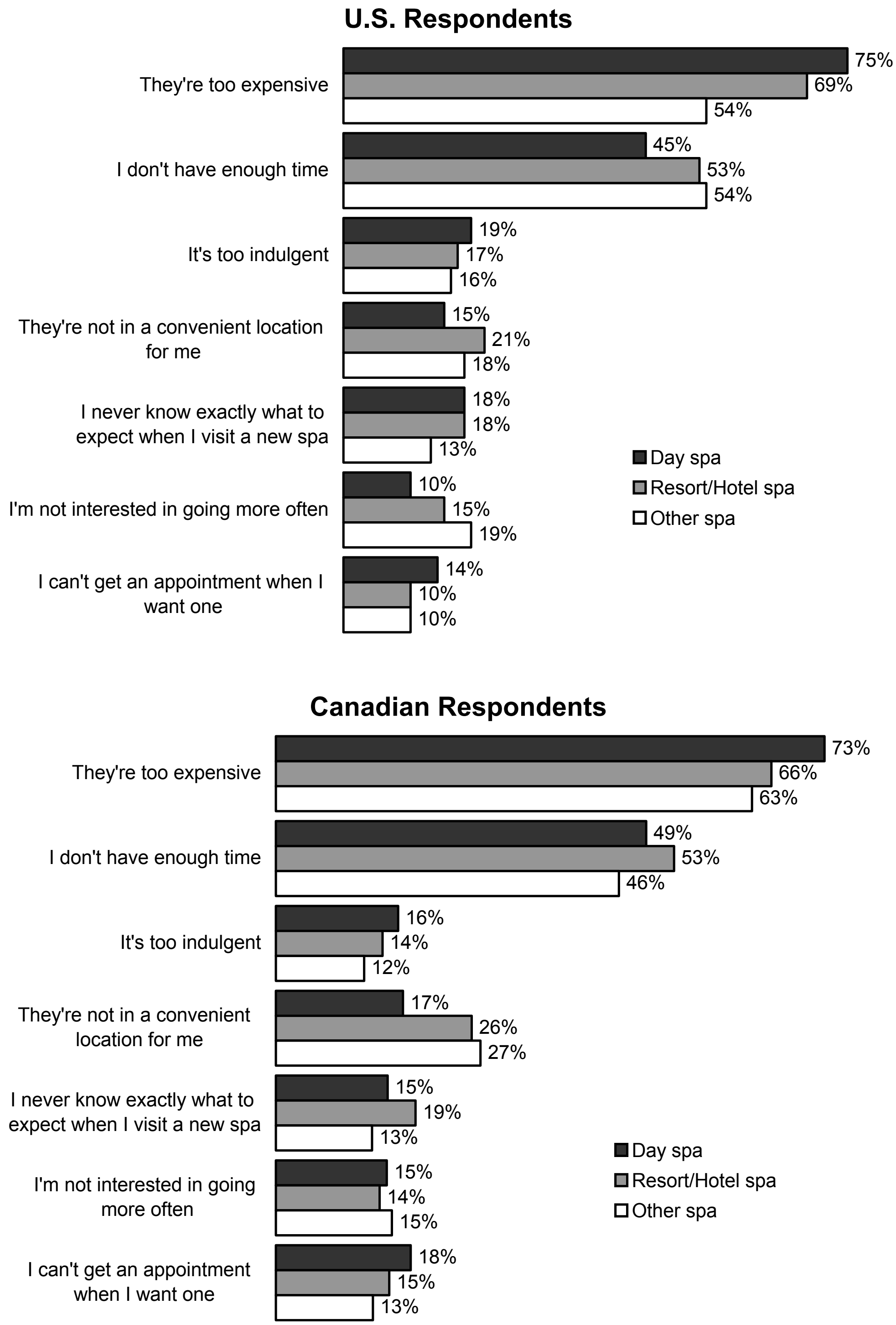
Figure 18
Reasons Not to Visit Spas More Often



Source: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Looking at these reasons by the type of spa last visited (Figure 19) shows some nuances that the aggregate results obscure. For example, day spa consumers are especially likely to regard expenses as a problem (about three-quarters of day spa consumers in each country say that expense is a factor). While U.S. consumers cite the secondary factors (too indulgent, inconvenient locations, unclear expectations) with about equal frequency (13-21% depending on spa type), Canadian consumers who last visited a resort/hotel or "other" spa are disproportionately likely to cite a lack of convenient locations (26% of resort/hotel spa consumers, 27% of other spa consumers).

Figure 19
Main Reasons You Don't Go to Spas More Often? (By Spa Type Last Visited)



Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Reasons Not to Visit Spas More Often: Gender Differences

- As with older spa-goers (see "Age Differences" below), men are more likely to feel they go to spas often enough already.* And although cost is a consideration for nearly all spa-goers (especially those in the Mid-level and Periphery segments of the spa world), it also plays a role in the decisions of more female spa-goers than male spa-goers.
  * Note: In the U.S. sample, male spa-goers are a little older than the female spa-goers, but not in the Canadian sample. So, it is unlikely that the gender differences are due to age. That is, the Canadian men are no older than the Canadian women and yet the men are still more likely than the women to indicate being uninterested in going to spas more often.

Reasons Not to Visit Spas More Often: Age Differences

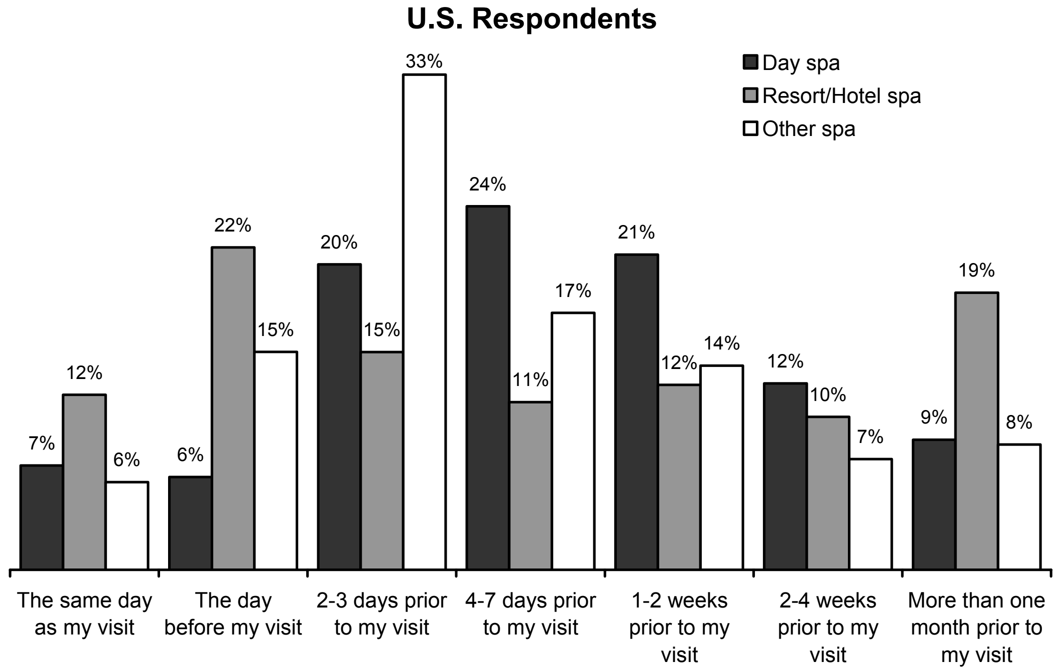
- One key practical consideration (lack of time) prevents some younger spa-goers from going to spas more often. Another way to look at it is to say that older spa-goers do not find the lack of time to be a significant barrier to visiting spas. Indeed, older spa-goers are much more likely than younger spa-goers to feel they already go to spas as often as they want.

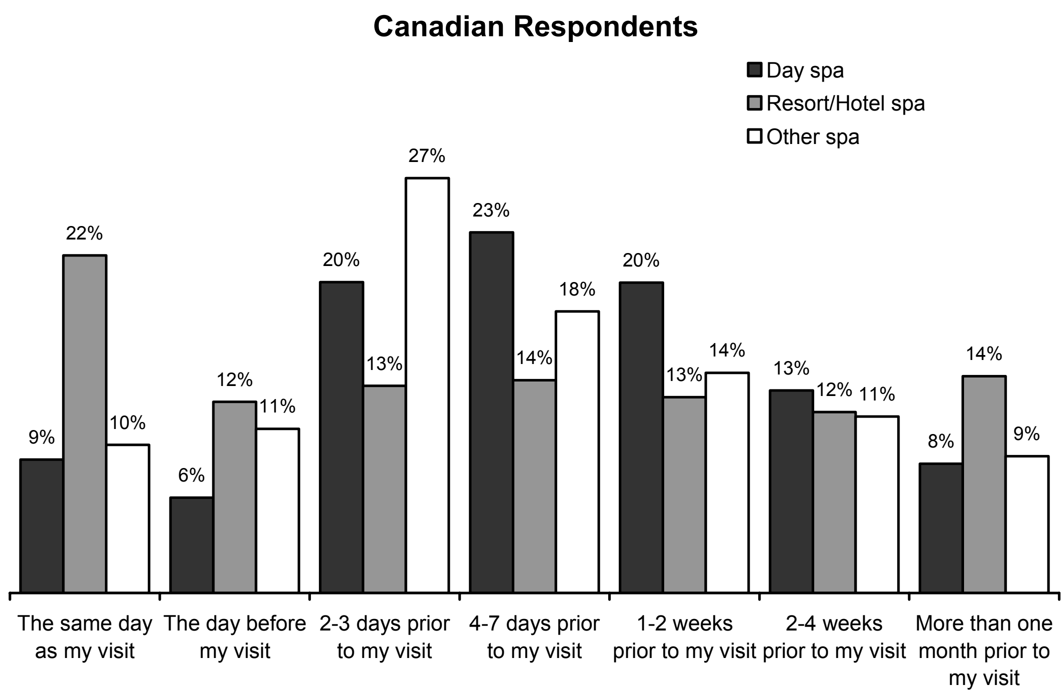
Advance Times for Planning Visit

While there was considerable variation in how far ahead spa-goers started planning their most recent spa visit, the most common advance times are (Figure 20):

- Among U.S. spa-goers, 4-7 days prior to visiting day spas;
- Among Canadian spa-goers, either 2-3 days or 1-2 weeks prior to visiting day spas;
- Among U.S. spa-goers, the day before visiting resort/hotel spas;
- Among Canadian spa-goers, the same day as visiting resort/hotel spas;
- In both countries: 2-3 days prior to visiting other spas.

Figure 20
Amount of Time Planning Ahead of Most Recent Spa Visit (By Spa Type)





Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

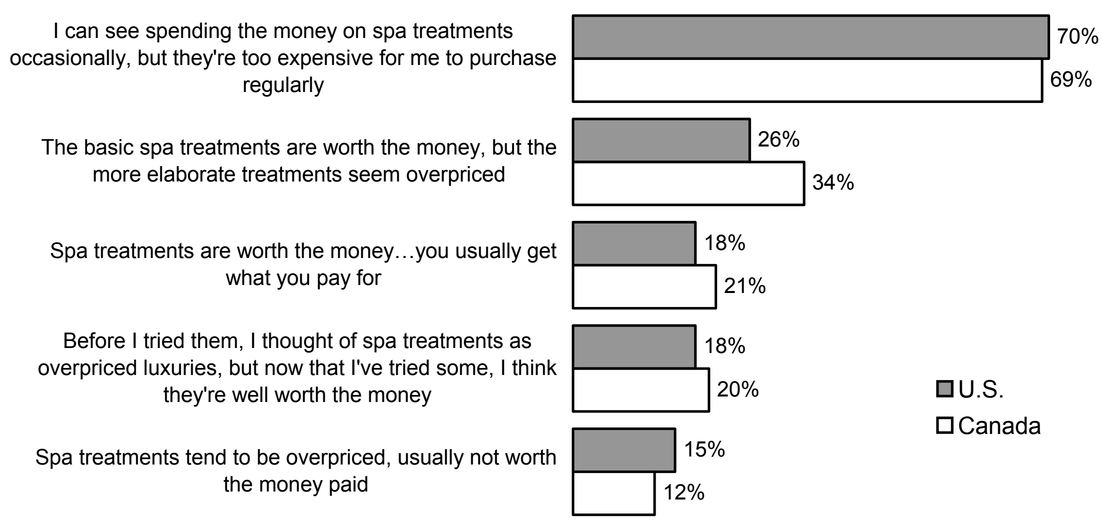
Advance Times for Planning Visit: Gender Differences

There is some evidence that women, especially in Canada, plan their spa visits farther in advance than do men. While few Canadian day spa-goers plan their day spa visit on the same day they visit, Canadian men are much more likely than women to show such spontaneity (17% of men vs. 7% of women). When planning a resort/hotel spa visit, Canadian women are more likely to begin planning at least 4 days in advance (56% vs. 48% of men). And Canadian women are more likely to begin planning at least 4 days in advance for a visit to some other type of spa (61% vs. 46% of men).

Views on Spa Costs

Opinions on the costs of spas are remarkably similar across countries (Figure 21). Solid majorities of U.S. and Canadian consumers agreed with the statement that "I can see spending the money on spa treatments occasionally, but they're too expensive for me to purchase regularly." No other provided statement garnered more than about one-third of consumers in agreement.

Figure 21
Your Opinion of the Costs of Spa Treatments in General



Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Not surprisingly, day spa-goers' responses to the most popular opinion ("I can see spending…too expensive for me to purchase regularly") was strongly dependent on the frequency of their spa visits. In both countries, those who visit day spas less often (about once every two months) are more likely to feel that "spa treatments…[are] too expensive for me to purchase regularly" than are those who visit day spas more frequently.[16]

Views on Spa Costs: Gender Differences

Only one of the five views registered a gender-based difference. Women in Canada are more likely to agree that "I can see spending the money on spa treatments occasionally, but they're too expensive for me to purchase regularly" (73% of females vs. 60% of males).

Views on Spa Costs: Age Differences

Similarly, only one opinion on spa costs registered an age-based difference. Older spa-goers in Canada are more likely than younger users to feel that "The basic spa treatments are worth the money, but the more elaborate treatments seem overpriced" (47% of users aged 55 & over vs. 30% among ages 35-54 and 27% among ages 18-34).

Spending Alternatives

While most spa-goers cite the cost of spas as the major factor limiting their spa use (see Figure 18 above), spa visits are also cited as the most enticing activity on which spa consumers would like to spend discretionary money. Still, they do find some alternative activities appealing as well (Figure 22). Most notably, sizable minorities of both U.S. and Canadian consumers selected dining, shopping and travel as activities on which they are likely to spend discretionary income. Notable differences are that U.S. consumers are more likely than Canadians to spend extra cash on travel, while Canadians are more drawn to movies than are their U.S. counterparts.

It is important to distinguish between (1) competing attractions – activities that compete with spas for consumers' patronage – and (2) partnering opportunities – activities that can potentially team up with spas to provide consumers with a fuller, more extensive experience. Looking again at the other activities appealing to many spa-goers – dining, shopping and travel – it seems clear that such activities can provide opportunities for spas to partner with. In fact, consumers who visit spas while traveling have listed these types of experiences – shopping, culinary travel experiences and cultural attractions – as the primary leisure activities they participated in on their most recent spa vacation.[17]

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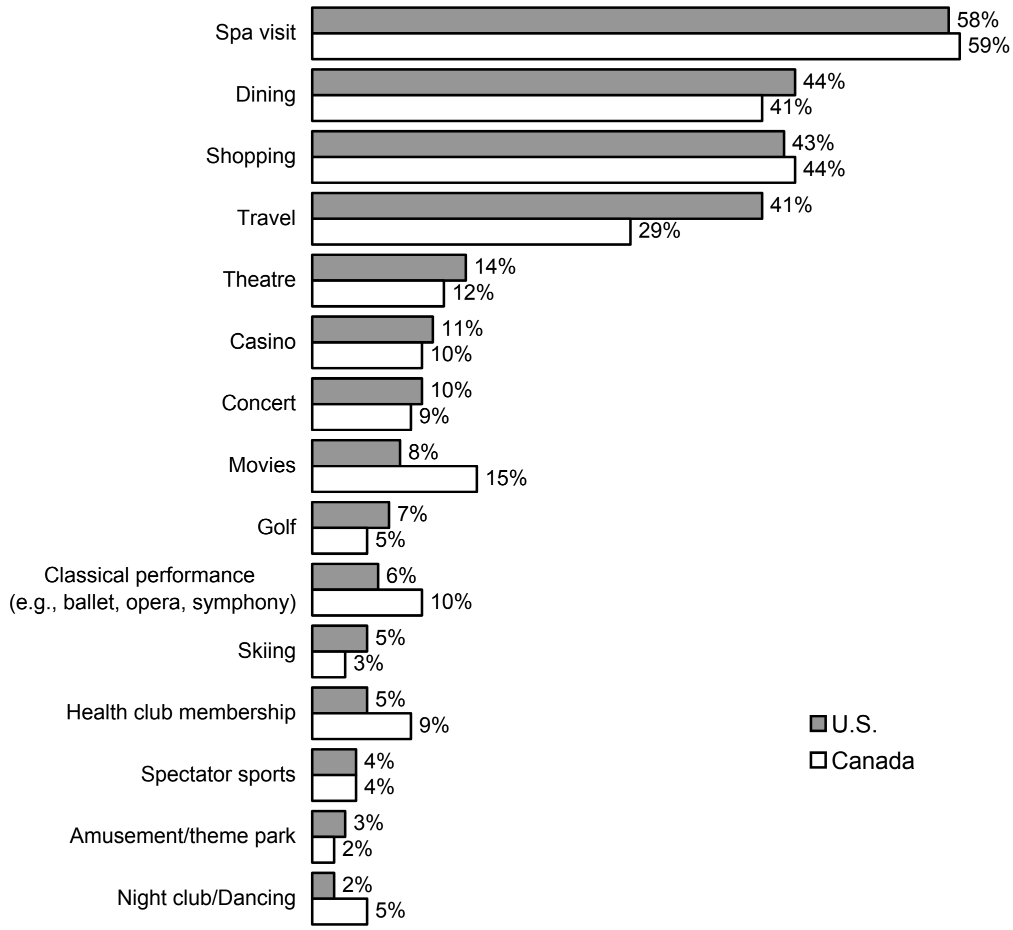
[16] Such patterns among resort/hotel spa-goers and "other" spa-goers were not testable, primarily due to low numbers of spa-goers visiting such spas numerous times per year.

[17] *Identifying the Spa Traveler: A Look at US and Canadian Consumer Attitudes and Motivators for Spa Vacations* (2006). For additional information, contact ISPA or Canadian Tourism Commission.

Figure 22
Imagine That You Had $200 of Additional Discretionary Income to Spend on Something for Yourself. On Which Activities Would You Most Likely Spend It?



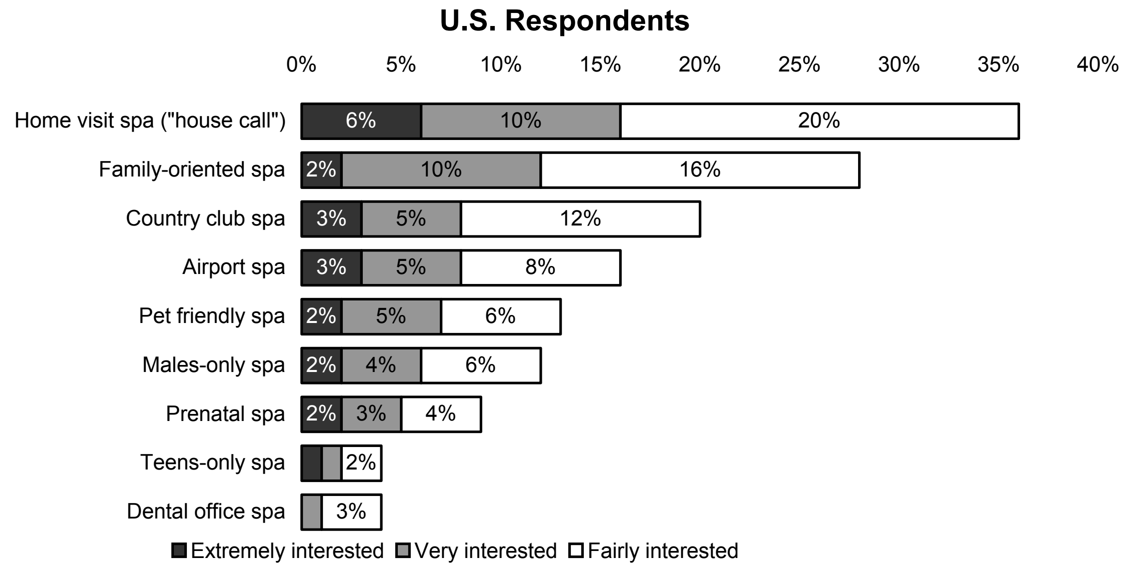
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

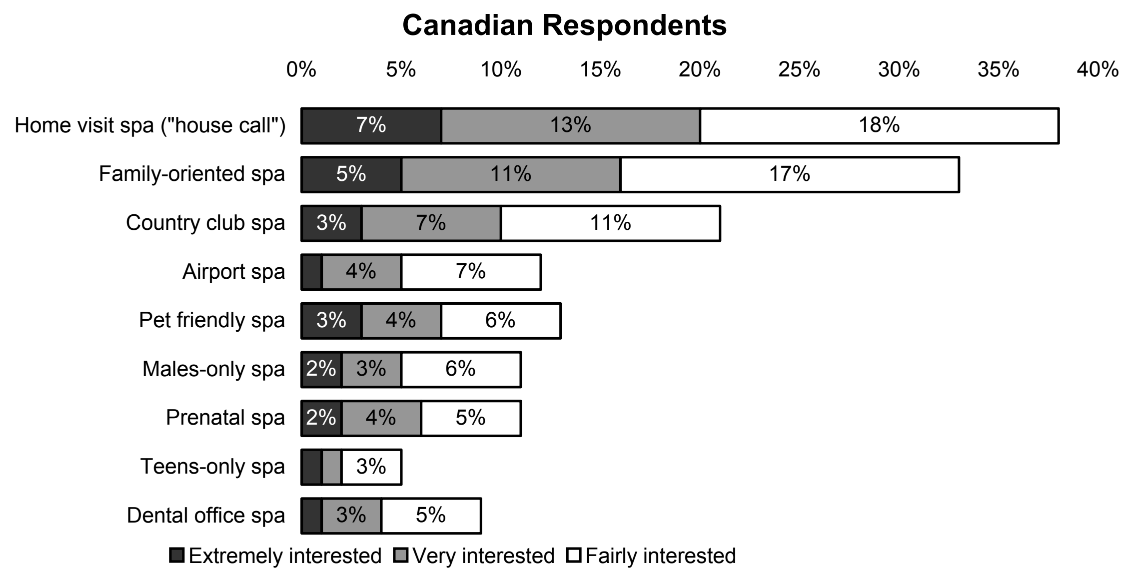
Attitudes Toward Spas

Interest in Innovative Spa Types

U.S. and Canadian consumers are remarkably similar in the assessments of various innovative spa types (Figure 23). The three most enticing types (in terms of the percentage of consumers at least "Fairly interested") are home visit ("house call") spa, family-oriented spa and country club spa. The spa types garnering the least interest (among those listed) are dental office spa and teens-only spa (the latter one understandably, since we surveyed only adults aged 18 and older).

Figure 23
Interest in Particular Types of Spas





Note: Percentage values below 2% are not displayed. Percentages for "Somewhat interested" and "Not at all interested" are also not shown.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Interest in Innovative Spa Types: Age Differences

As would be expected, there are considerable differences across age in the interest in some types of specialty spas – in every instance, youth drives interest. Several patterns exist in both the U.S. and Canada: younger spa consumers are significantly more interested in home visit spas than are their older counterparts; older consumers (aged 55 and over) show relatively little interest in airport spas; younger consumers (aged 18 to 34) show much more interest in prenatal spas than do older consumers. In addition, compared to older Canadians, younger Canadians show more interest in several types of spas: country club, pet friendly and teens-only.

Benefits Sought by Spa Consumers

U.S. and Canadian spa consumers concur on the top five benefits they seek on most spa visits: relaxation, calm/quite/peacefulness, pampering, time out for themselves, and refreshment (Figure 24). Canadian consumers are significantly more likely than U.S. consumers to seek/value the following qualities: energized, maintaining appearance, journey and rebirth.

Figure 24
Benefits You Personally Seek or Highly Value on Most Spa Visits

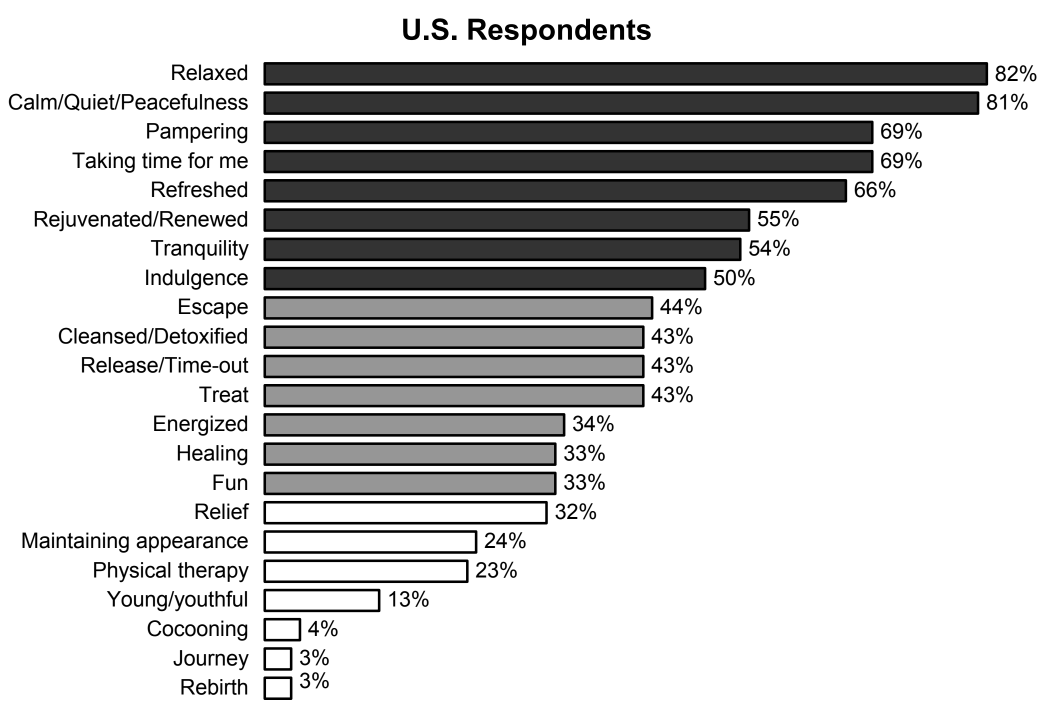
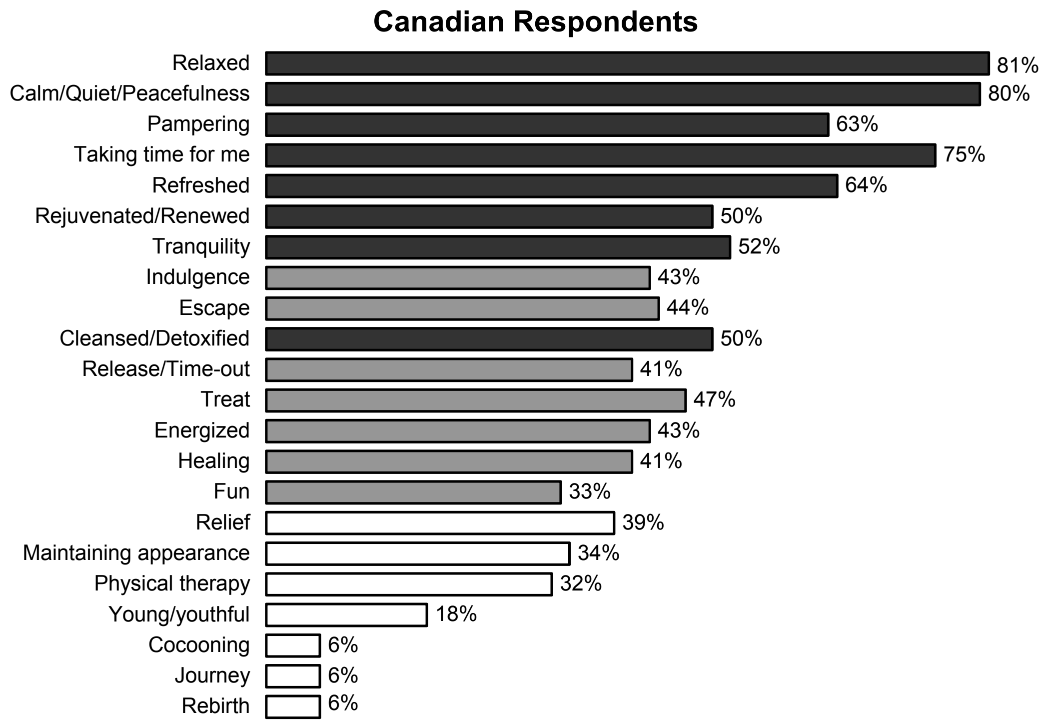


Figure 24 (continued)
Benefits You Personally Seek or Highly Value on Most Spa Visits



Note: Benefits are ranked into three groups (using U.S. rankings as a basis for comparison) and shaded accordingly for each country.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Benefits Sought: Gender Differences

- When it comes to benefits sought at spas, women have much better notions of what they're seeking. When presented with a list of possible benefits sought (or highly valued) on most spa visits, women in both countries selected on average about 2 more benefits than did men (9.7 by women vs. 7.6 by men in the U.S.; 10.0 vs. 8.1 in Canada).
- But some benefits stand out (in both counties) as being much more valued by women than by men: pampering, taking time for me, indulgence, treat, release/time-out and maintaining appearance. Notably, most of these (the first four listed) female-favored benefits fall into the theme of Indulgence as opposed to Escape or Work.[1]
- Conversely, one benefit is significantly more valued by men in both countries: physical therapy.

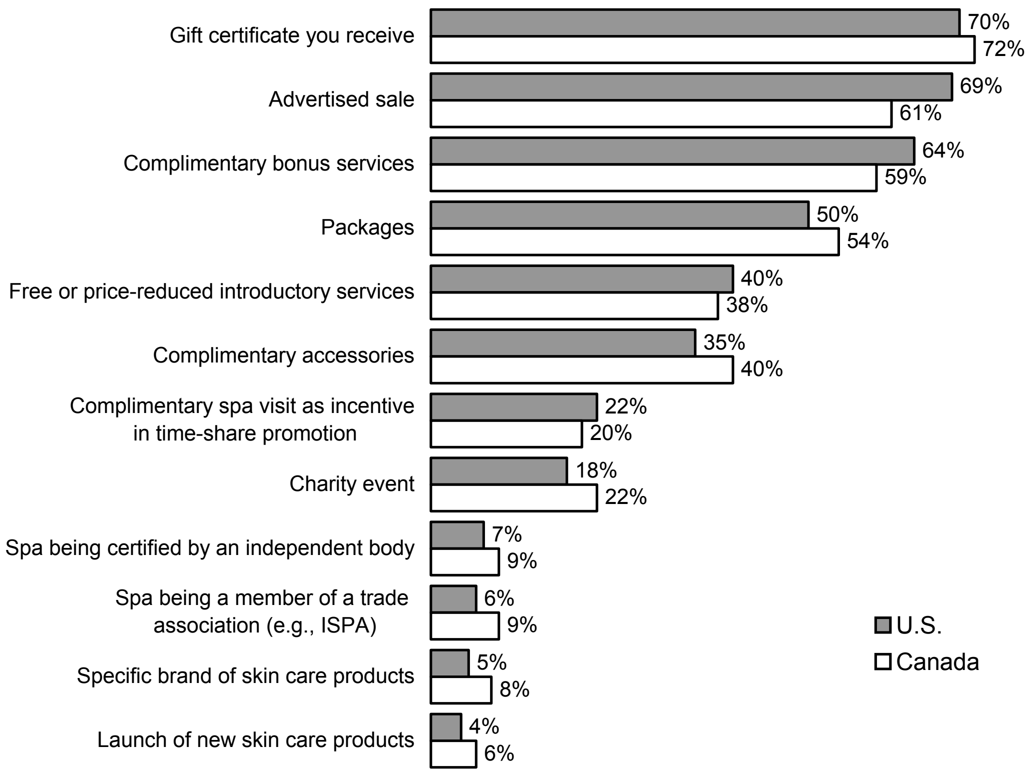
Benefits Sought: Age Differences

Among U.S. spa-goers, practically no spa benefit is valued more often by one age group than another. But in Canada, several benefits stand out as being more valued by younger spa-goers than their older counterparts: rejuvenated/renewed, escape, release/time-out, fun and young/youthful. These five benefits actually span the three spa themes of Indulgence (fun), Escape (escape, release/time-out) and Work (rejuvenated/renewed, young/youthful) fairly equally, preventing any easy classification of these age-related differences.

Effectiveness of Marketing Options

U.S and Canadian spa consumers are remarkably similar in reacting to marketing options to increase spa visits (Figure 25). In both countries, the most enticing marketing strategies are gift certificates, advertised sales, complimentary bonus services, and spa service packages.

Figure 25
Marketing Options That Would Make You More Likely to Visit a Particular Spa

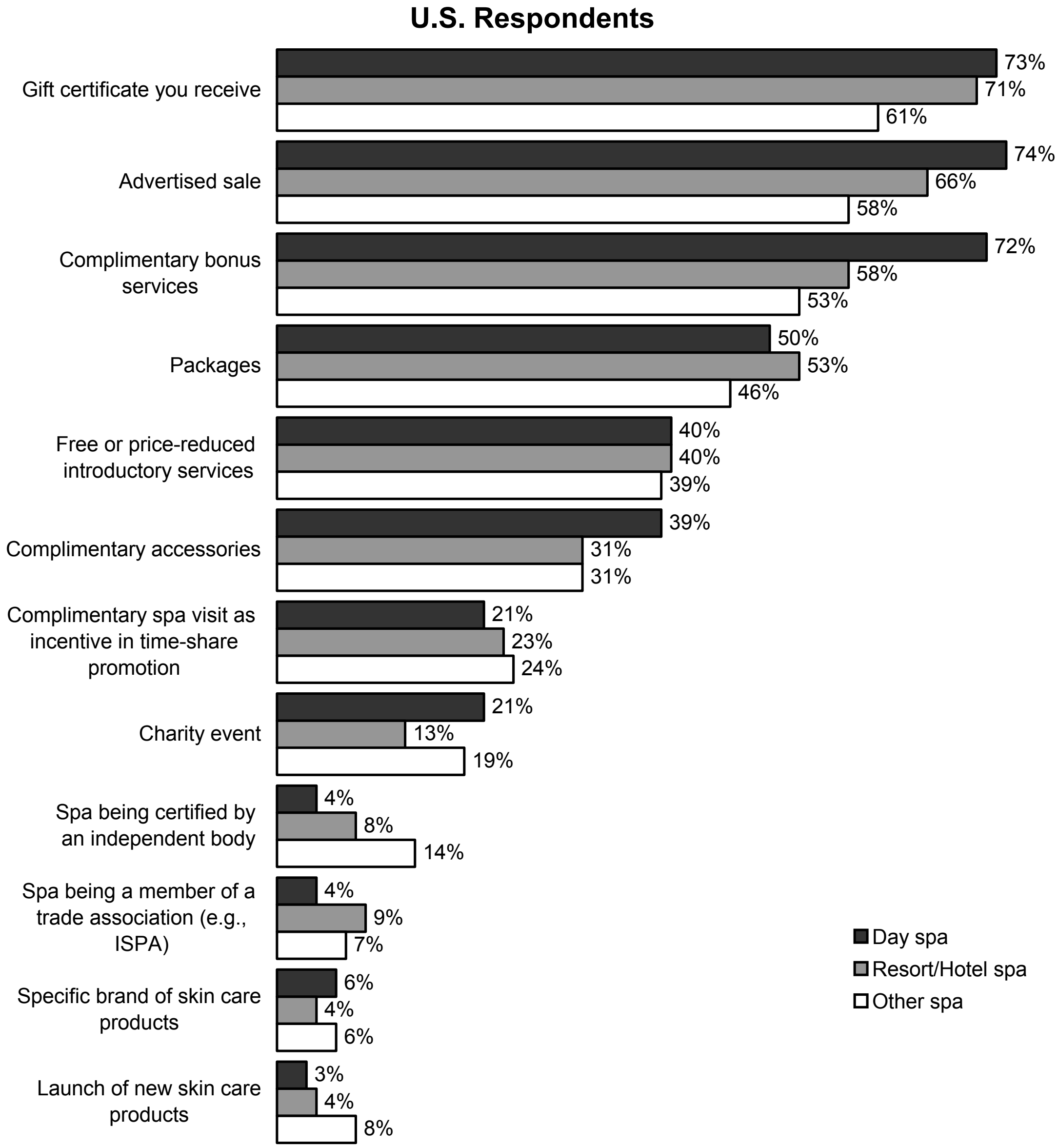


Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Marketing Effectiveness Across Spa Types

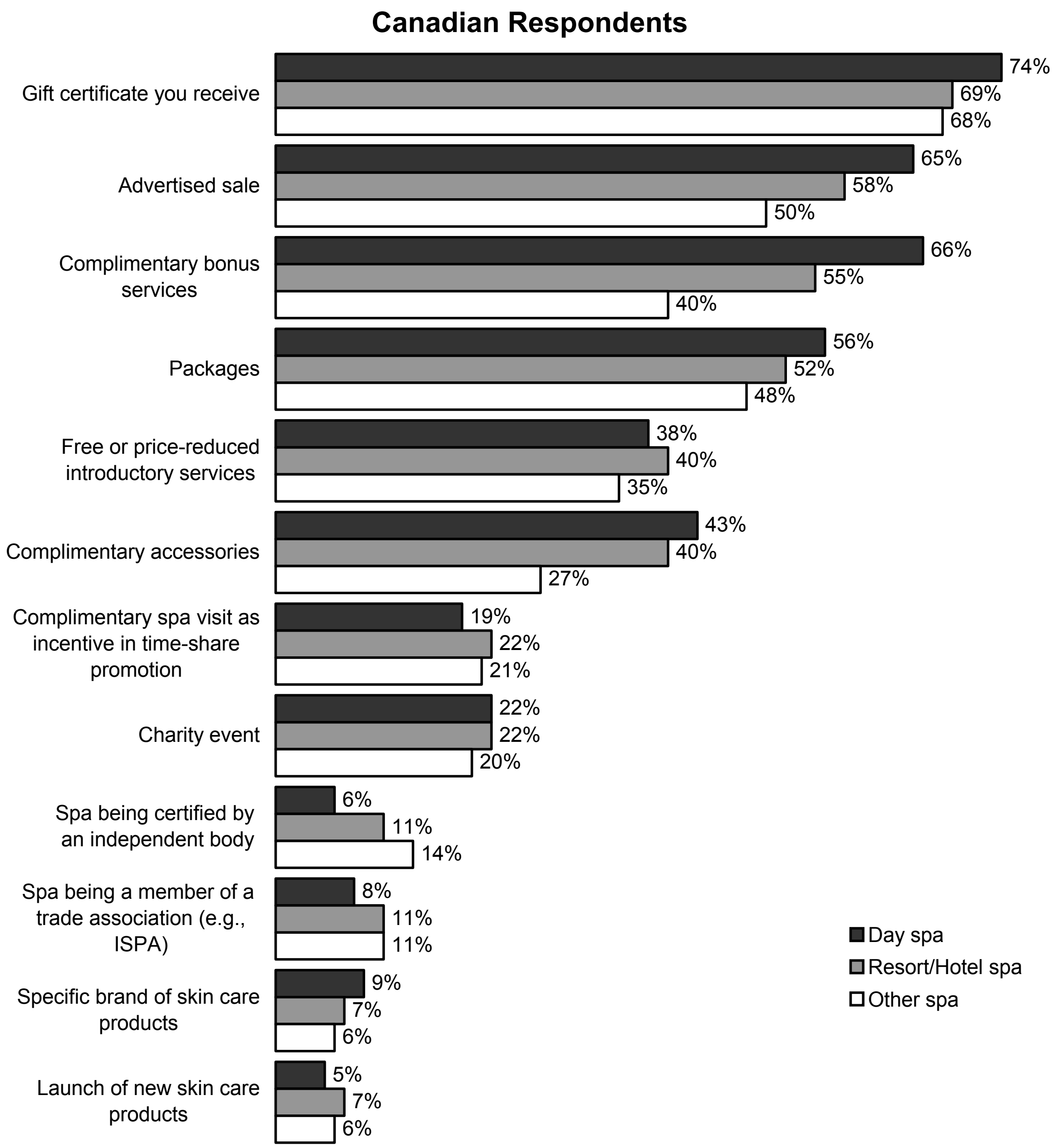
Looking across spa type last visited, there are a few notable differences in consumers' reactions to particular marketing options (Figure 26). In both countries, the three most effective marketing strategies – gift certificates, advertised sales and complimentary bonus services – will be more effective when used for day spas and least effective when used for "other" spas. In Canada, this pattern also holds true for offering complimentary accessories. In the U.S., one strategy that will be more effective for other spas – especially for club spas (25%) and medical spas (17%) – is being certified by an independent body. In both countries, resort/hotel spas have the same top four marketing options: gift certificates, advertised sales, complimentary bonus services, and packages.

Figure 26
Marketing Options That Would Make You More Likely to Visit a Particular Spa



Source: U.S. results based on 1707 respondents.

Figure 26 (continued)
Marketing Options That Would Make You More Likely to Visit a Particular Spa



Source: Canadian results based on 1909 respondents.

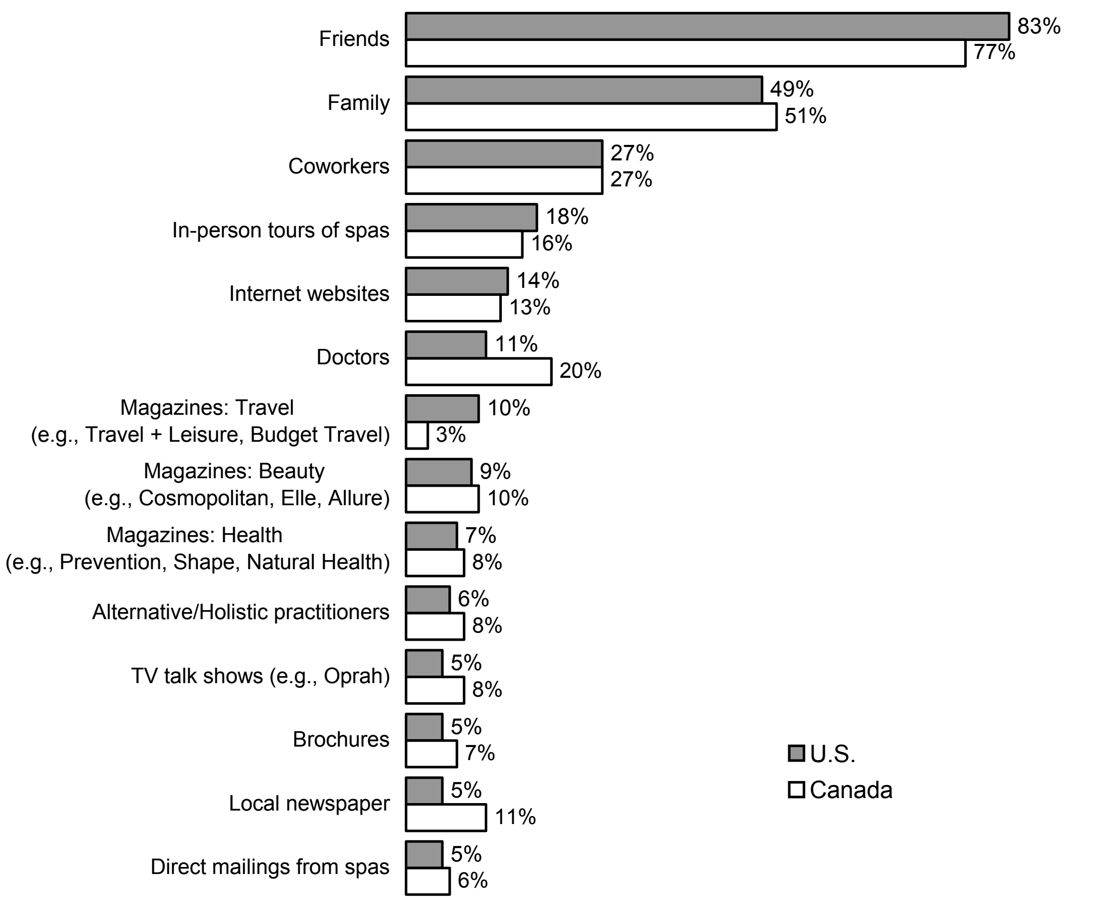
Trusted Information Sources

Personal contacts are more trusted for information on spas than are more impersonal media sources (Figure 27). When seeking information on which spas to visit, consumers (in both countries) are most likely to trust friends, followed by family members and coworkers. Interesting differences across countries are that Canadians spa consumers are more likely than

Americans to trust doctors and local newspapers for spa information, while Americans are more likely than Canadians to trust travel magazines.

Finally, while in-person spa tours ranks fairly well in both countries, the adoption of tours should be considered with caution. First, it is unlikely that 16-18% of spa-goers have actually taken such tours; i.e., some of the respondents advocating tours are not answering with first-hand knowledge. And second, spa tours can have detrimental affects as well, most notably presenting an intrusion into the tranquil atmosphere sought by spa patrons.

Figure 27
Which of These Information Sources Do You Trust the Most to Help You Decide Which Spas to Visit?



Note: Information sources not displayed and receiving less than 5% are Magazines: Lifestyle (e.g., O, Self, Real Simple); National newspaper (e.g., USA Today, New York Times); TV news; Mobil Travel Guide ratings; Health care books; TV commercials; Magazines: News/Current Affairs ; (e.g., Newsweek, Atlantic Monthly); Radio programs (NPR, talk shows); Magazines: Food (e.g., Cooking Light, Gourmet, Bon Appetit); Radio commercials; Magazines: Home and Garden (e.g., Better ; Homes and Gardens, Good Housekeeping); Magazines: Entertainment (e.g., People, Entertainment Weekly).
Sources: U.S. results based on 1707 respondents; Source: Canadian results based on 1909 respondents.

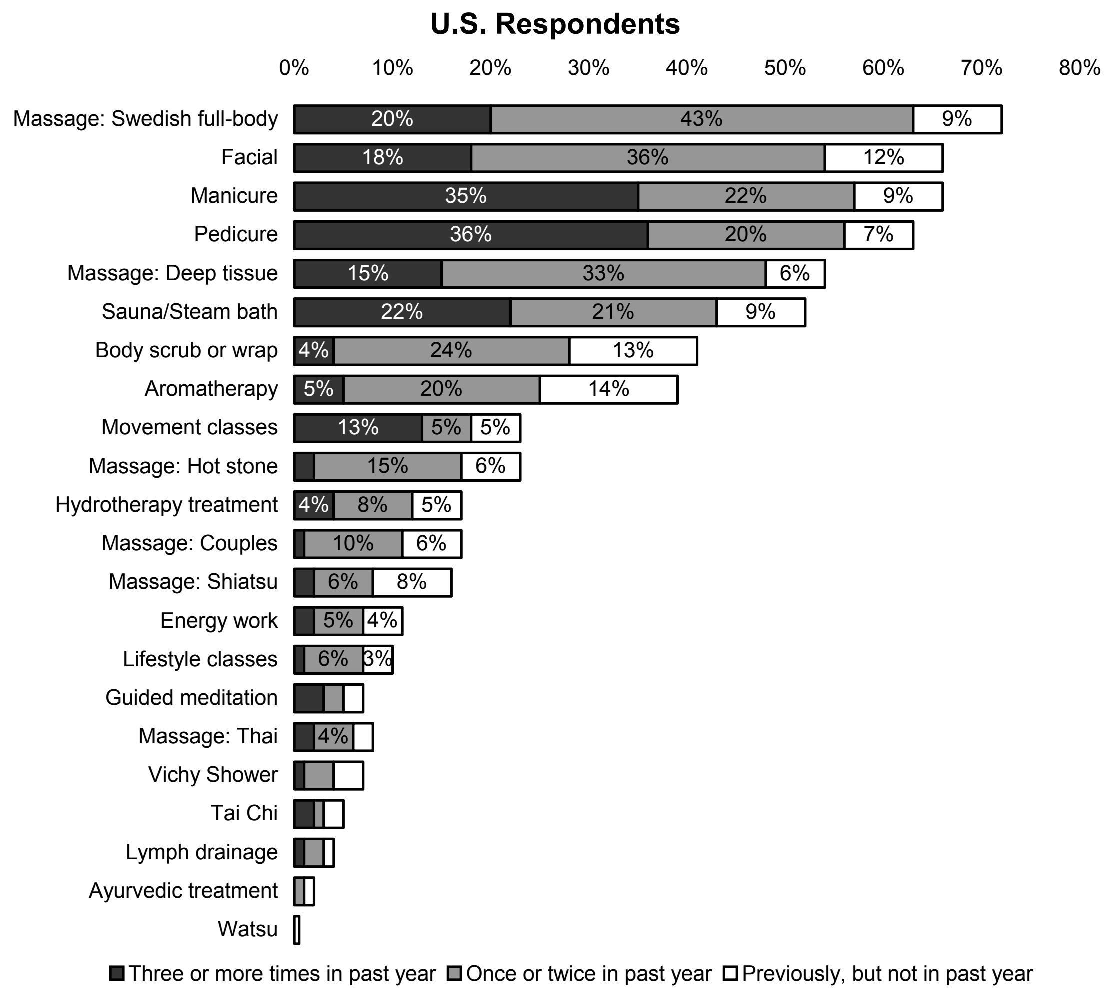
Spa Treatments

Treatments Most Often Experienced

As presented earlier (see Figure 8), U.S. and Canadian spa consumers have similar patterns in terms of the type of treatment experienced within the past year. But when we take a more comprehensive look at their spa-going histories, we see differences in terms of the frequency and timing of such treatments.

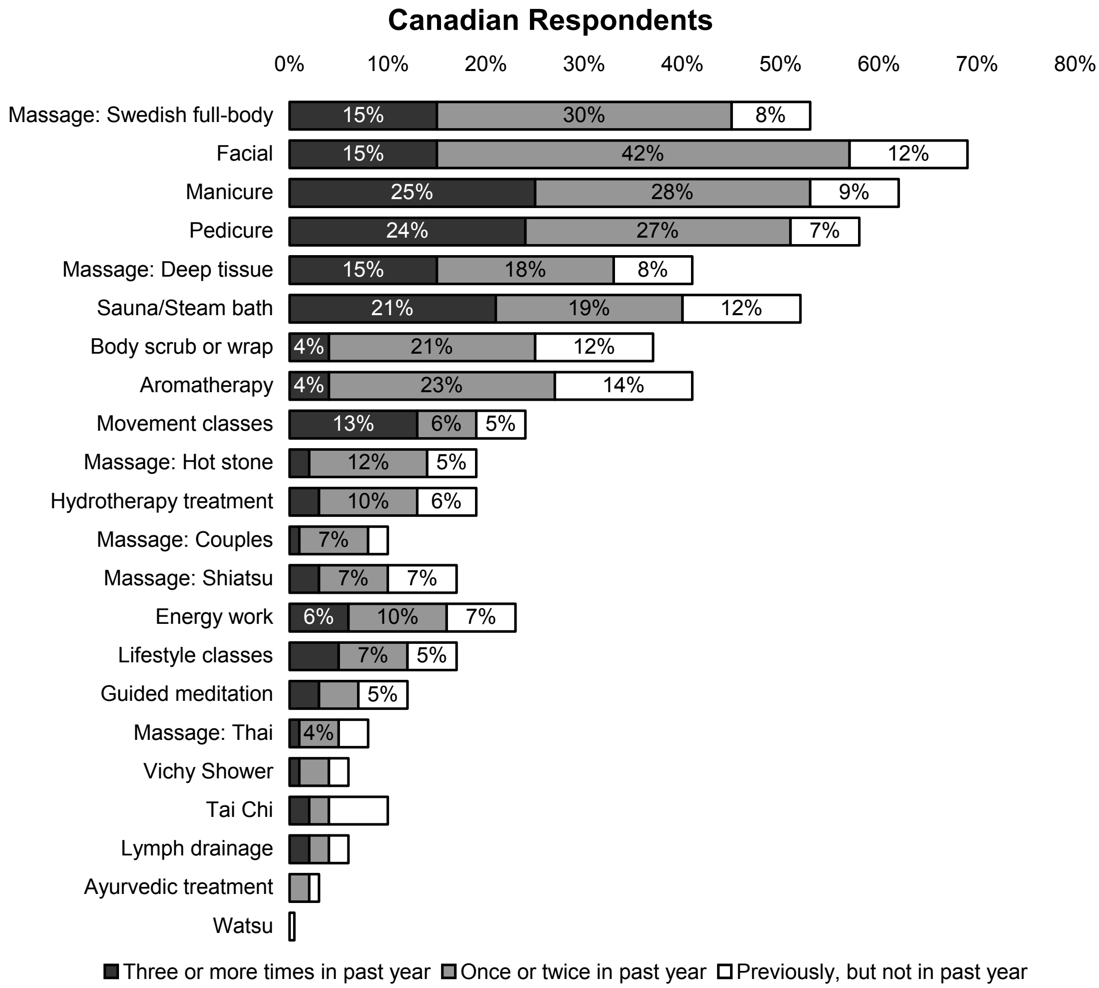
For example, while U.S. and Canadian spa-goers share the same set of most popular treatments (Swedish full-body massage, facial, manicure and pedicure), for each of these treatments U.S. spa-goers are more likely to have experienced it multiple times in the past year (Figure 28). U.S. spa-goers are also considerably more likely than Canadians to experience deep tissue massage *a single time* in the past year, perhaps a reflection of Americans trying, but then rejecting from further use, that particular treatment.

Figure 28
How Often Have You Received the Following Treatments?



Note: Percentage values below 4% are not displayed. Percentages for "Never" are also not shown.
Source: U.S. results based on 1707 respondents.

Figure 28 (continued)
How Often Have You Received the Following Treatments?



Note: Percentage values below 4% are not displayed. Percentages for "Never" are also not shown.
Source: Canadian results based on 1909 respondents.

Consumer Familiarity with Treatments

U.S. spa consumers know, or at least claim to know, more about spa treatments than do their Canadian counterparts. When asked to indicate which spa treatments they have "sufficient knowledge [of] to know what to expect," spa consumers rank particular treatments (in terms of familiarity) with striking consistency across the two countries (Figure 29).

But while the order of the treatments is very similar, the percentage of consumers claiming familiarity with a particular treatment tends to be higher among Americans. In particular, U.S. spa consumers are more likely (than Canadian consumers) to be familiar with the details of six specific treatments: pedicure, body scrub/wrap, and four types of massages (Swedish full-body, deep tissue, hot stone and couples). Conversely, Canadian spa consumers are more likely (than U.S. consumers) to be familiar with energy work (e.g., Reiki, reflexology).

Figure 29
Spa Treatments of Which You Have Sufficient Knowledge to Know What to Expect

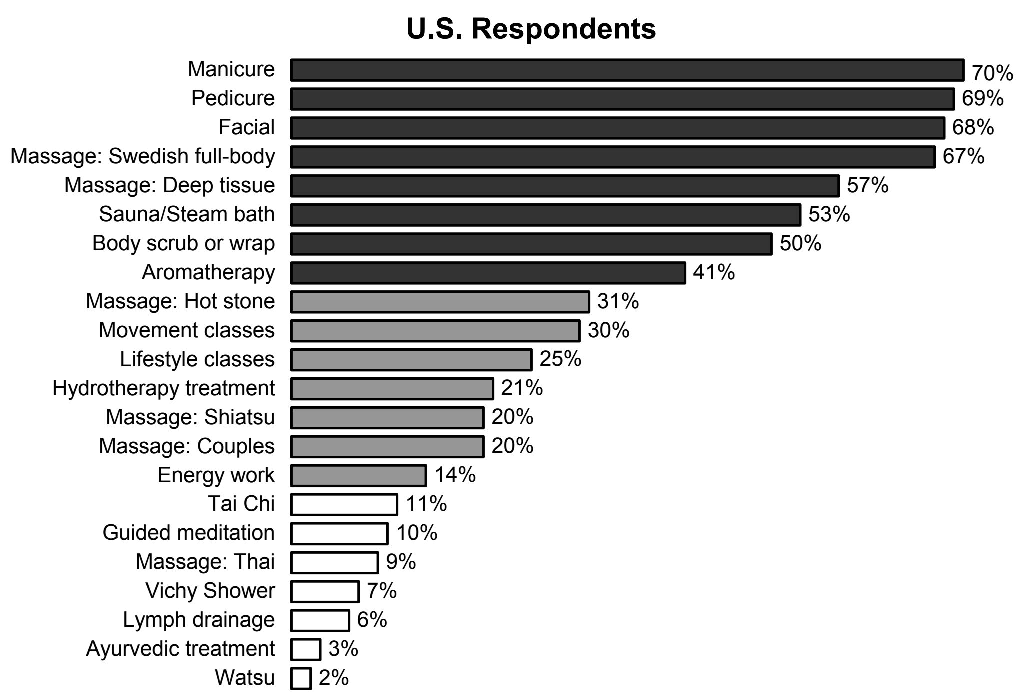
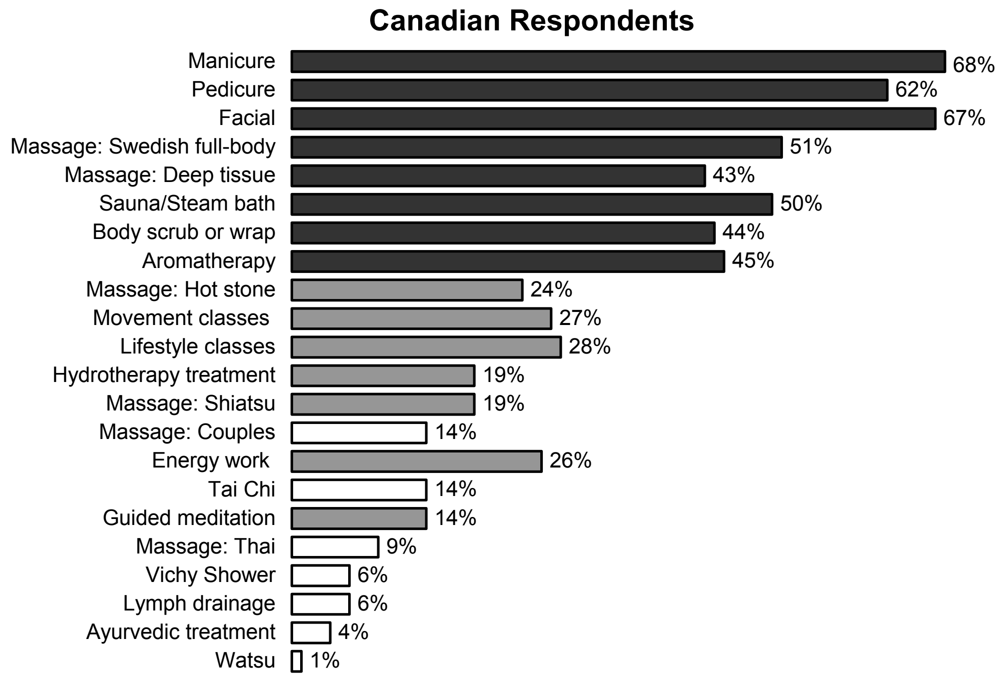


Figure 29 (continued)
Spa Treatments of Which You Have Sufficient Knowledge to Know What to Expect

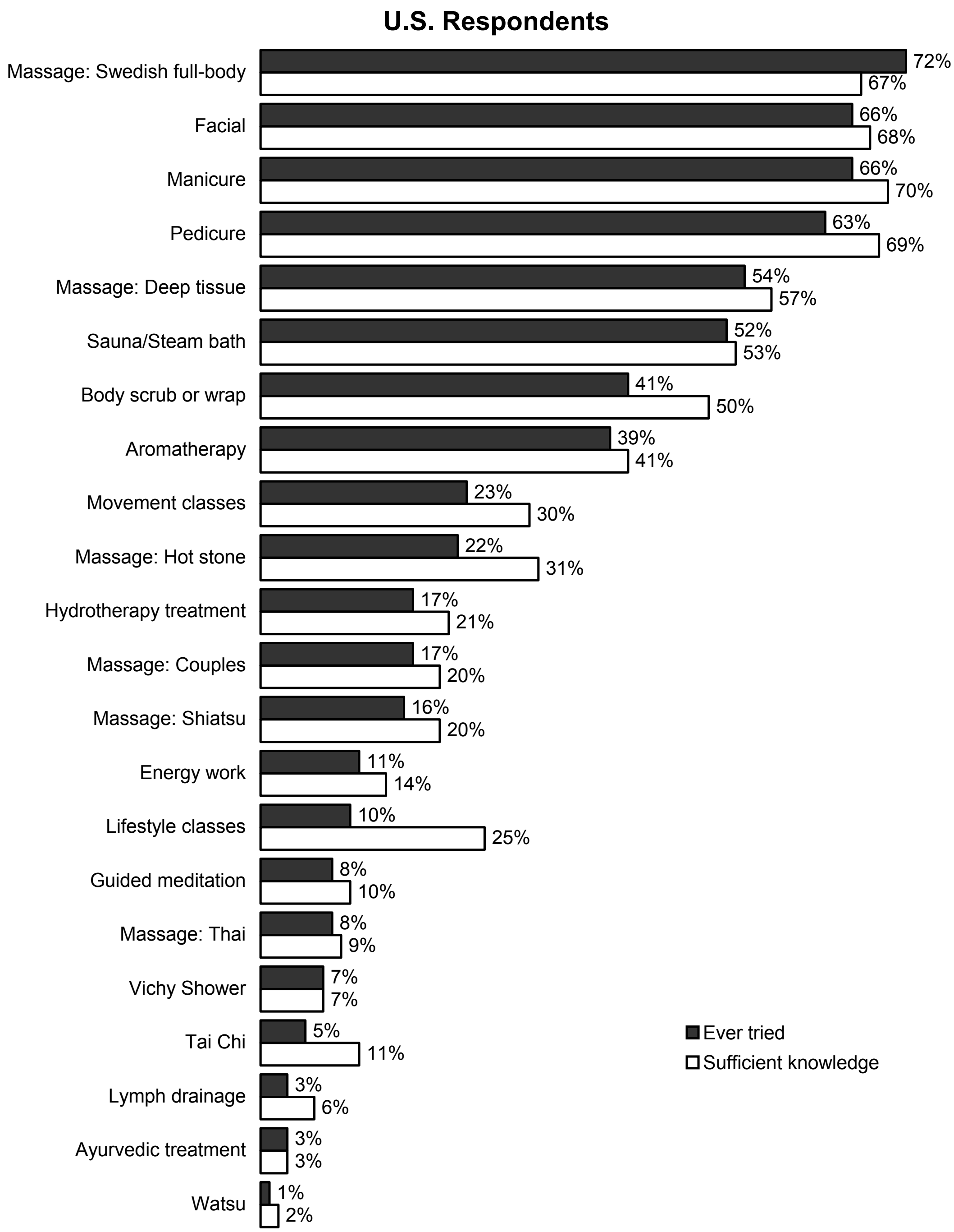


Note: Treatments are ranked into three groups and color-coded accordingly for each country.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Treatments: Familiarity vs. Exposure

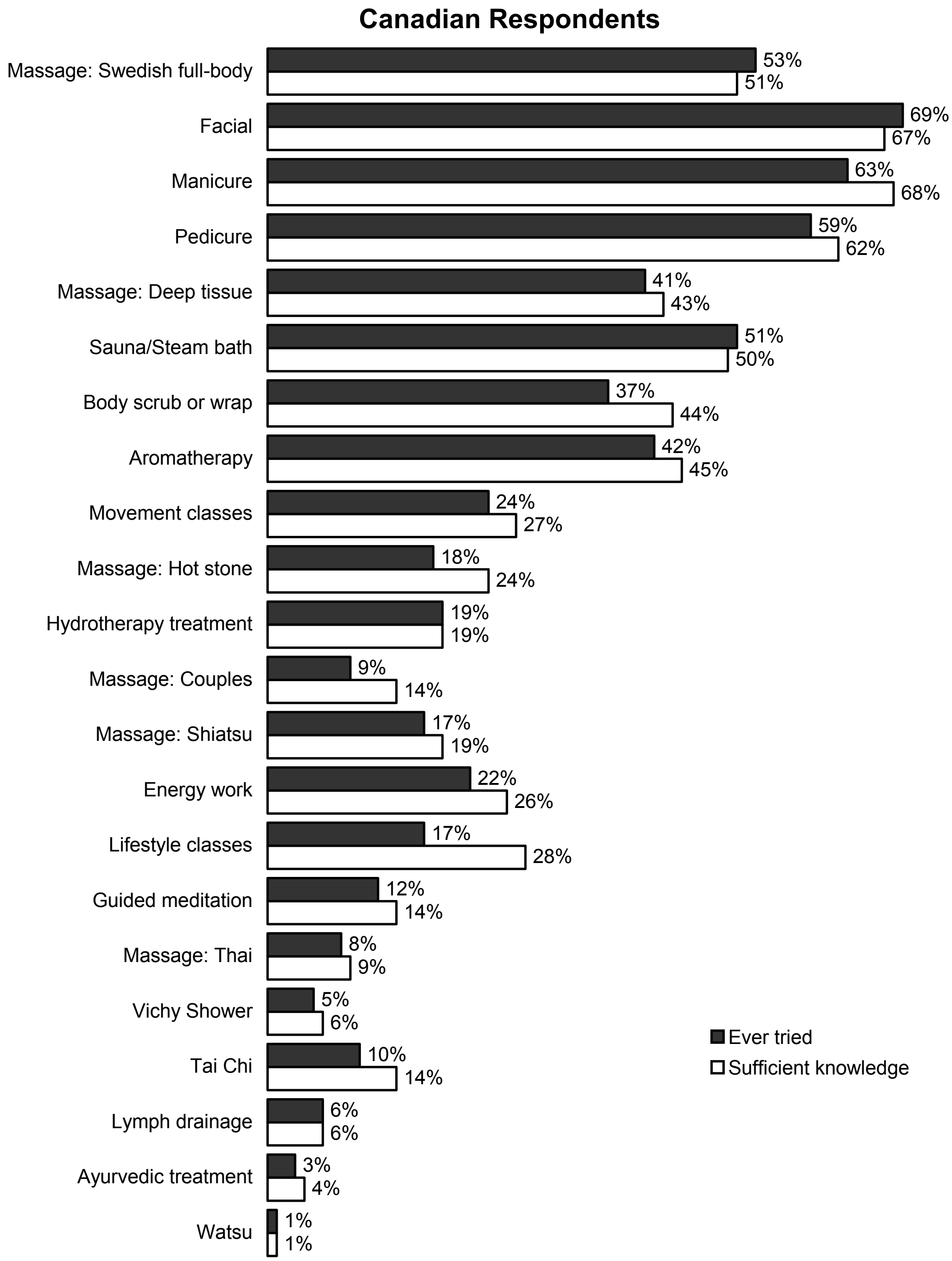
It turns out that some types of treatments are better known than actual exposure would suggest, particularly in the U.S. Such findings help to identify treatments that are relatively familiar to spa-goers who have yet to participate in them and thereby present plausible areas of potential growth in customer use. For example, two and a half times as many U.S. spa-goers profess familiarity with lifestyle classes as have actually participated in such classes (Figure 30). Other treatments showing unexpectedly high familiarity (given their actual participation rates) in the U.S. are body scrub/wrap and hot stone massage. Only one treatment type shows a similar pattern of having much greater familiarity than exposure in Canada: lifestyle classes. Conversely, more popular treatments (in both countries) such as Swedish full-body massage and sauna/steam bath are so widely experienced that few spa-goers are familiar with them without having experienced them.

Figure 30
Spa Treatments: Ever Tried and Sufficient Knowledge



Source: U.S. results based on 1707 respondents.

Figure 30 (continued)
Spa Treatments: Ever Tried and Sufficient Knowledge

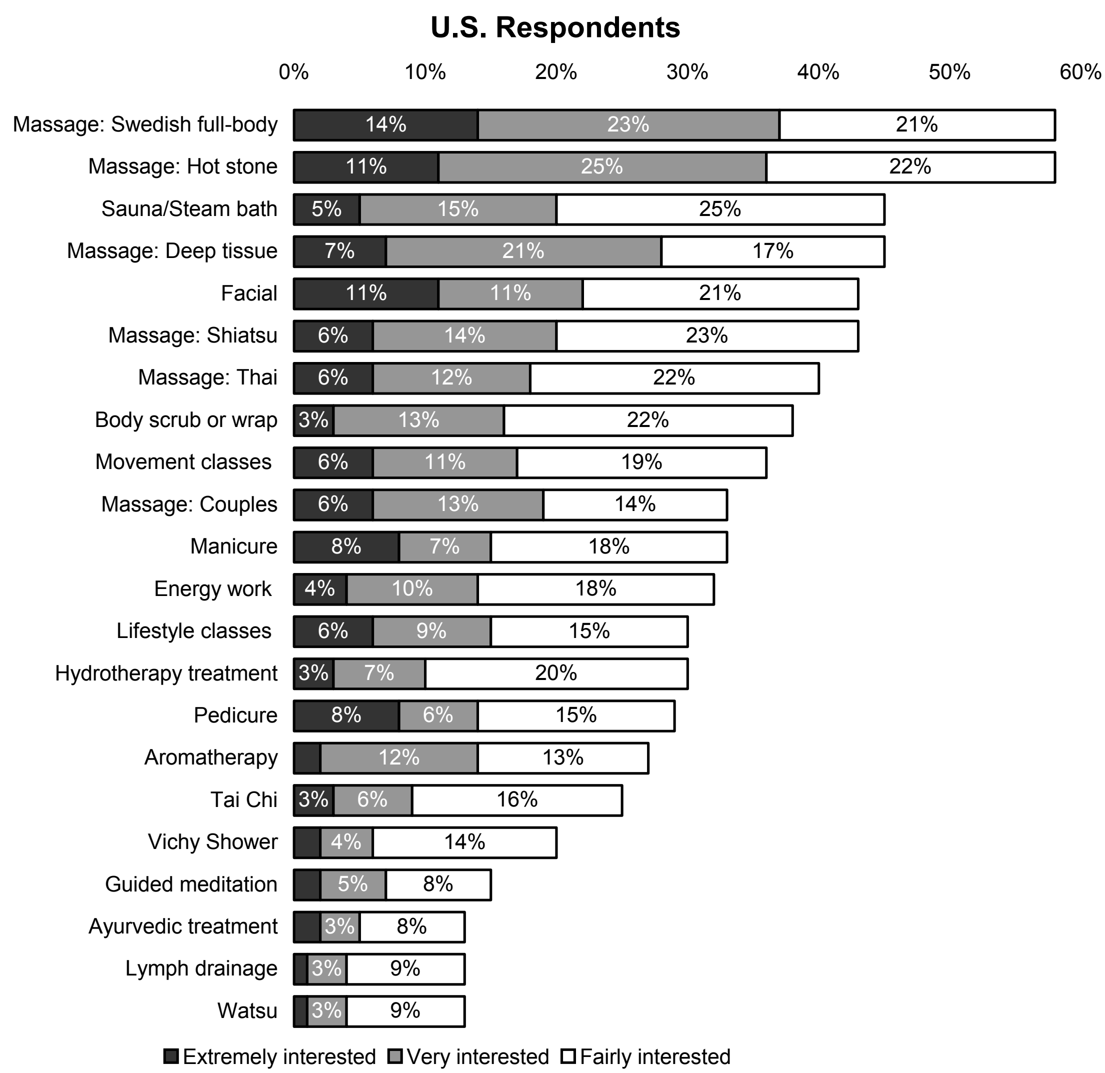


Source: Canadian results based on 1909 respondents.

Interest in Untried Treatments

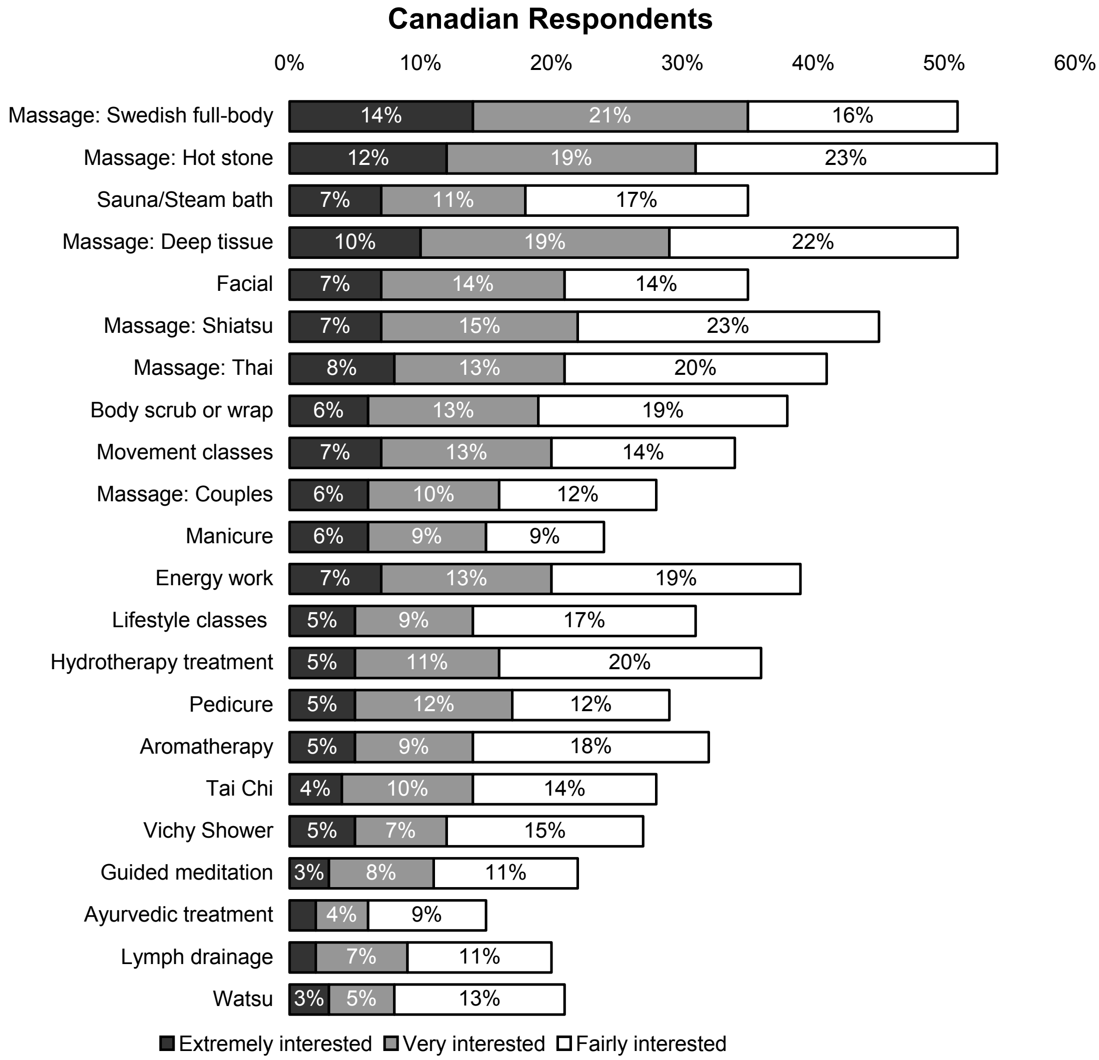
Even among consumers who have not yet experienced them, there is substantial interest in trying some of the most popular treatments, especially Swedish full-body massage, hot stone massage, sauna/steam bath, deep tissue massage and shiatsu massage (Figure 31).

Figure 31
You Indicated That You Have Never Received the Following Spa Treatments. How Interested Are You in Receiving Each Treatment in the Next 12 Months?



Note: Percentage values below 3% are not displayed. Percentages for "Somewhat interested" and "Not at all interested" are also not shown.
Source: U.S. results based on 482 to 1690 respondents, depending on particular treatment.

Figure 31 (continued)
You Indicated That You Have Never Received the Following Spa Treatments. How Interested Are You in Receiving Each Treatment in the Next 12 Months?



Note: Percentage values below 3% are not displayed. Percentages for "Somewhat interested" and "Not at all interested" are also not shown.
Source: Canadian results based on 587 to 1896 respondents, depending on particular treatment.

Interest in Untried Treatments: Spa-Goer Profiles

- When we examine the characteristics of spa-goers interested in receiving various types of treatments they have yet to experience, several patterns emerge, especially in Canada. Among treatments in which inexperienced Canadian spa-goers are most interested (all of them being massages: Swedish full-body, hot stone, deep tissue and Shiatsu), patrons at least fairly interested are more likely than uninterested spa-goers to be younger (aged 18-44) and single (including "in a committed relationship"). No consistent patterns are evident across race/ethnicity, education, income or geography.
- Meanwhile, no consistent pattern exists among U.S. spa-goers. Among treatments in which inexperienced U.S. spa-goers are most interested (four types of massages – Swedish full-body, hot stone, deep tissue and Shiatsu – plus sauna/steam bath and facial), those interested are generally indistinguishably (at least demographically) from uninterested spa-goers. For example, while those interested in trying hot stone massage are more likely (than those not interested) to be female, younger (aged 18-34) and single, those interested in trying sauna/steam bath are disproportionately male.

Treatments: Exposure vs. Additional Interest

Naturally, spa-goers often show interest in spa services they have never experienced. By assessing the percentage of spa-goers who are very interested in receiving a particular service that they have yet to experience (especially in comparison to the percentage of spa-goers who have already experienced the service), it is possible to identify services with potential opportunities for additional usage. Candidates for expansion include the following (from Table 6):

- Thai Massage: While only 8% of both U.S. and Canadian spa-goers have experienced it, over twice that many (17% of U.S. and 20% of Canadian spa-goers) have not tried it but are very interested in doing so.
- Hot Stone Massage: While 22% of U.S. and 18% of Canadian spa-goers have experienced it, larger numbers (28% of U.S. and 26% of Canadian spa-goers) have not tried it but are very interested in doing so.
- Couples Massage: While 17% of U.S. and 9% of Canadian spa-goers have tried it, 16% of U.S. and 15% of Canadian spa-goers have not tried it but are very interested in doing so.

Table 6
Spa Treatments: Experience and Interest

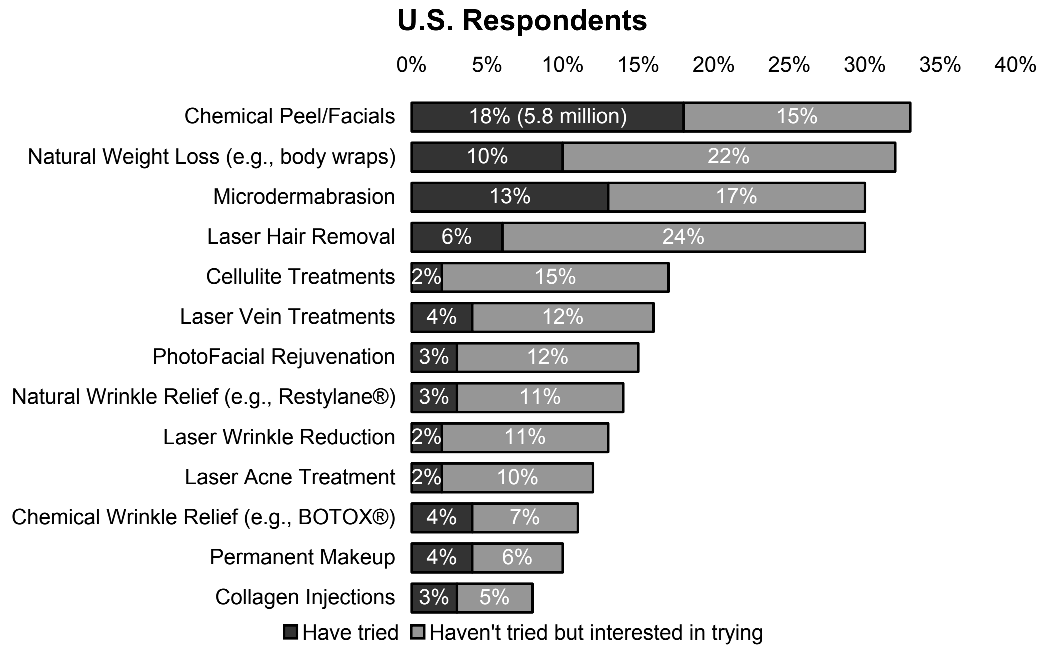
	% Spa-goers Who Have Already Experienced Service		% Spa-goers Very Interested In Trying It For First Time	
	U.S.	Canada	U.S.	Canada
Massage: Standard full-body	72%	53%	11%	16%
Facial	66%	69%	8%	6%
Manicure	66%	63%	5%	5%
Pedicure	63%	59%	5%	7%
Massage: Deep tissue	54%	41%	13%	17%
Sauna/Steam bath	52%	51%	9%	9%
Body scrub or wrap	41%	37%	10%	12%
Aromatherapy	39%	42%	9%	8%
Movement classes	23%	24%	13%	16%
Massage: Hot stone	22%	18%	28%	26%
Hydrotherapy treatment	17%	19%	8%	13%
Massage: Couples	17%	9%	16%	15%
Massage: Shiatsu	16%	17%	17%	18%
Energy work	11%	22%	12%	16%
Lifestyle classes	10%	17%	13%	12%
Guided meditation	8%	12%	6%	10%
Massage: Thai	8%	8%	17%	20%
Vichy Shower	7%	5%	6%	11%
Tai Chi	5%	10%	8%	12%
Lymph drainage	3%	6%	4%	8%
Ayurvedic treatment	3%	3%	5%	7%
Watsu	1%	1%	4%	7%

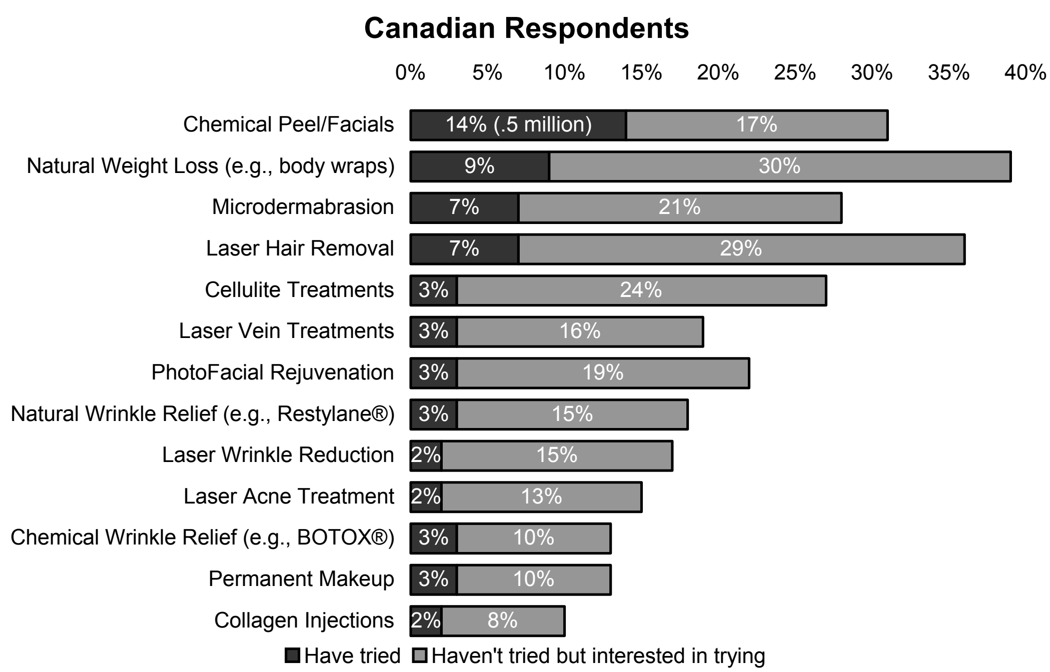
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Interest in Medical Spa Treatments

Canadians show somewhat more experience with medical treatments, as well as more interest in trying them, than do their American counterparts (Figure 32). While interest in chemical peels/facials and microdermabrasion are about equally prevalent in the two countries, Canadians show somewhat more interest than do Americans in natural weight loss, laser hair removal, cellulite treatments and photofacial rejuvenation.

Figure 32
Which Medical Treatments Have You Tried or Are Interested in Trying?





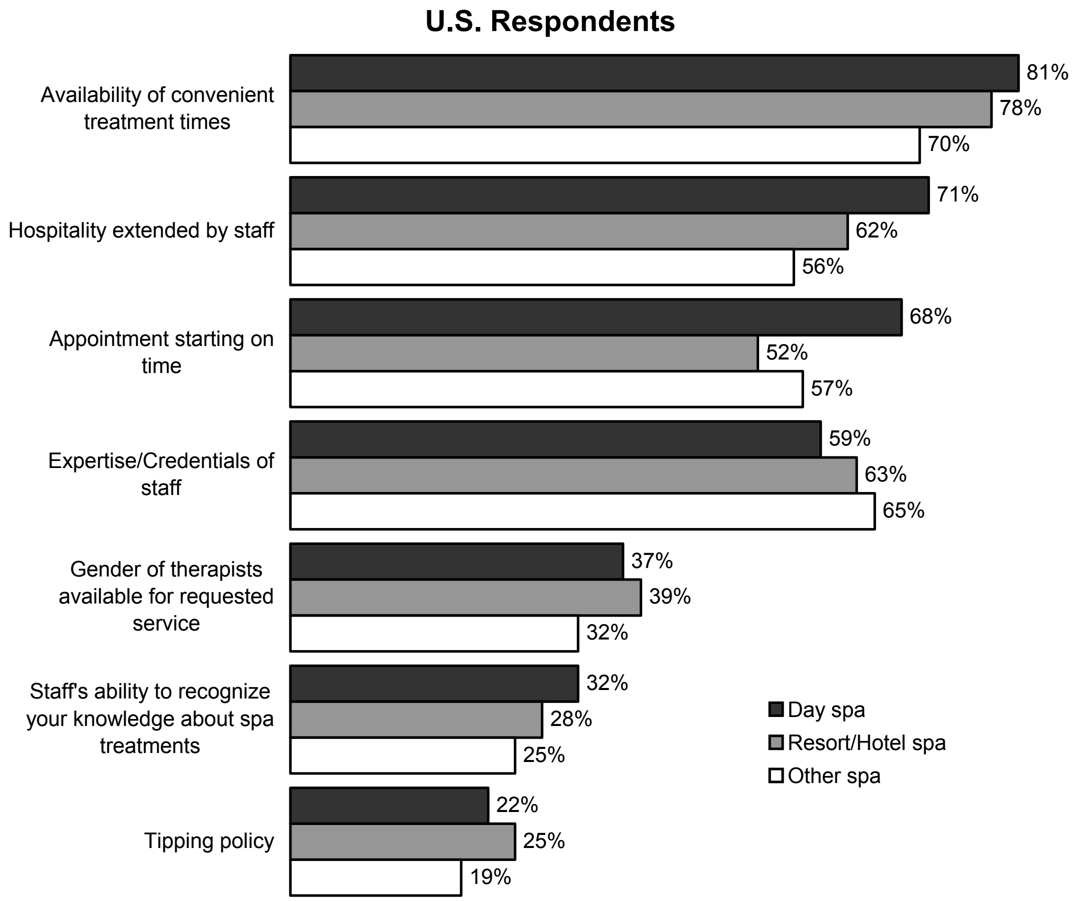
Note: Based on four possible responses: Have tried; Haven't tried but interested in trying; Haven't tried but interested in learning more about it; Haven't tried and not interested.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

The Spa Experience

Importance of Customer Service

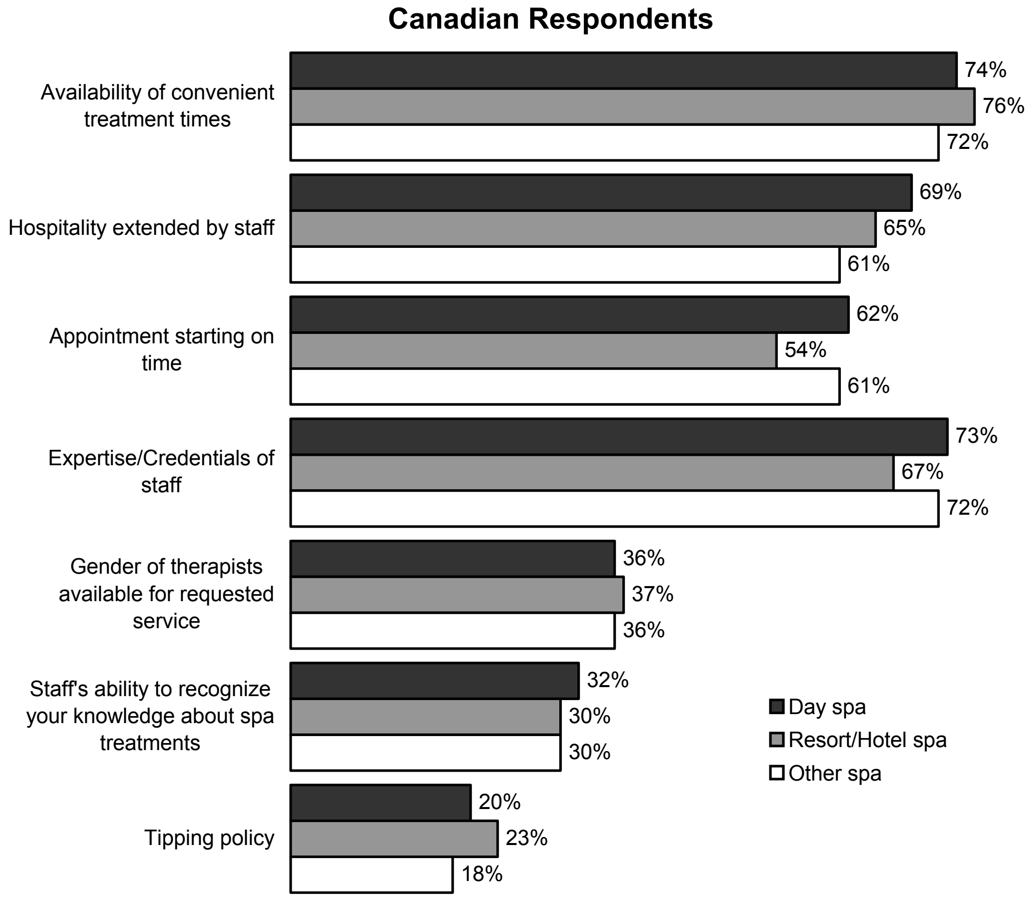
Regardless of country or spa type, the most important aspect of customer service for spa consumers is the availability of convenient treatment times (Figure 33). But there are differences as well. Staff hospitality and treatments starting on time are more important among day spa goers than with other spa types, especially in the U.S. Also, staff expertise and credentials are more important (across all spa types) among Canadian consumers than in the U.S.

Figure 33
Which Aspects of Customer Service are Essential to Your Enjoyment of a Spa Experience (At the Type of Spa You Last Visited)?



Source: U.S. results based on 1707 respondents.

Figure 33 (continued)
Which Aspects of Customer Service are Essential to Your Enjoyment of a Spa Experience (At the Type of Spa You Last Visited)?

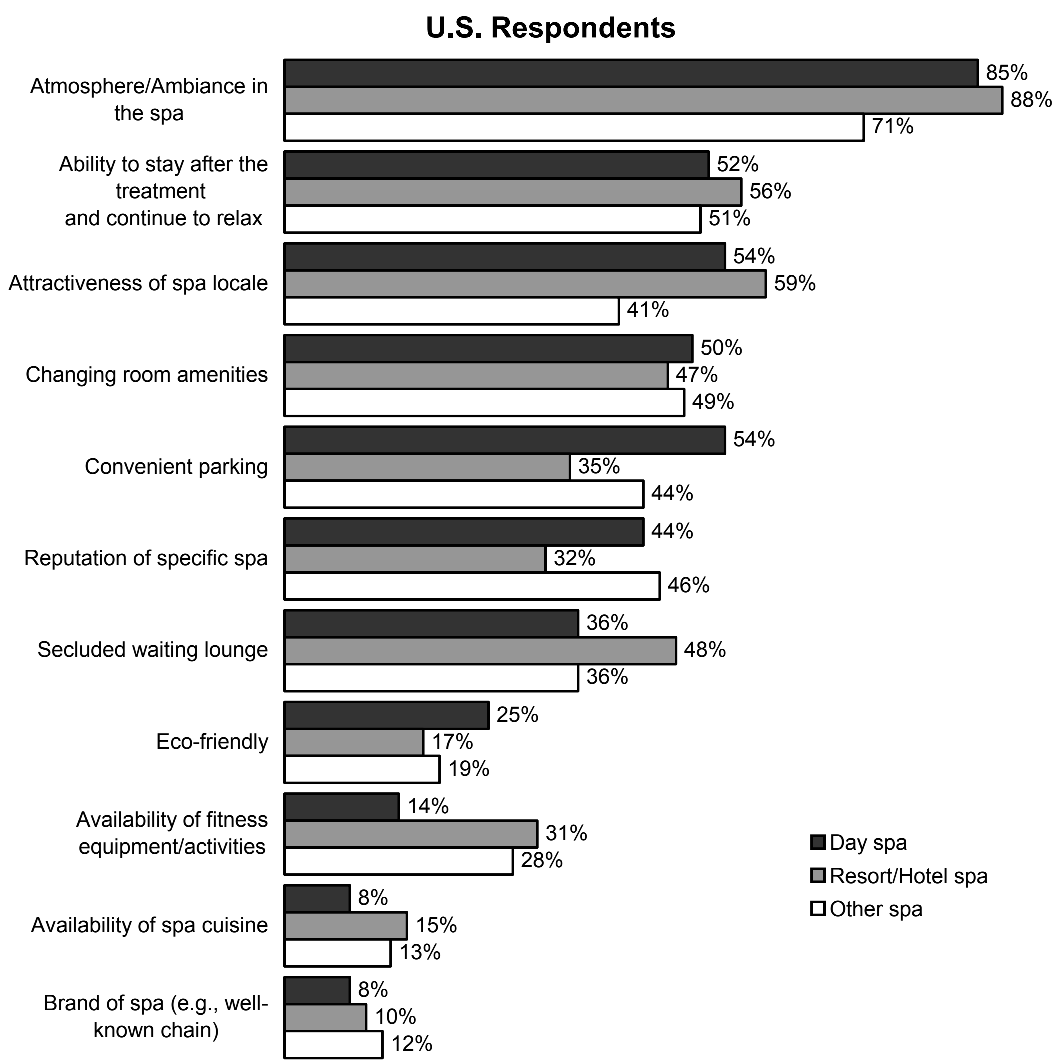


Source: Canadian results based on 1909 respondents.

Importance of Amenities and Features

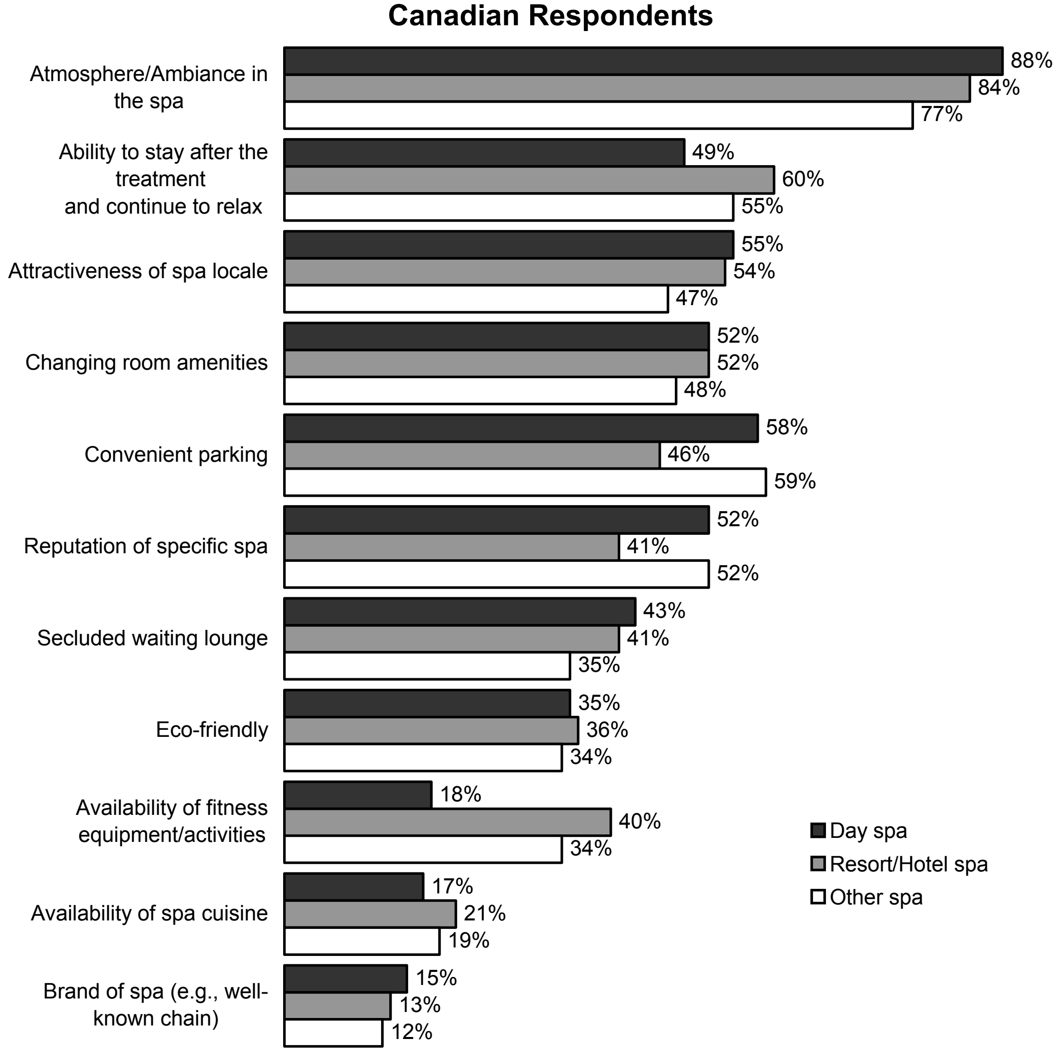
Clearly the most important amenity or feature for spa consumers in both countries, regardless of spa type, is the atmosphere (ambience) in the spa (Figure 34). Among less vital features, Canadian consumers show more interest in a spa being eco-friendly than do U.S. consumers.

Figure 34
Which Amenities and Features are Essential to Your Enjoyment of a Spa Experience (At the Type of Spa You Last Visited)?



Source: U.S. results based on 1707 respondents.

Figure 34 (continued)
Which Amenities and Features are Essential to Your Enjoyment of a Spa Experience (At the Type of Spa You Last Visited)?



Source: Canadian results based on 1909 respondents.

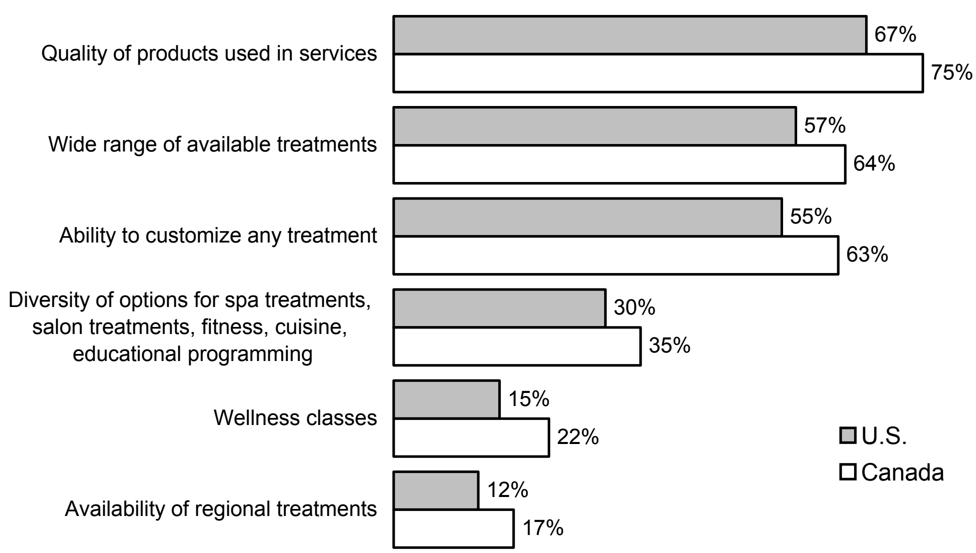
Importance of Amenities and Features: Gender Differences

Differences across gender about which spa amenities are essential vary largely by country. In the U.S., female and male spa-goers largely agree on which amenities are essential. But in Canada, females and males have differing opinions. Women in Canada are more likely than their male counterparts to view the following amenities/features as essential: atmosphere/ambiance in the spa; quality of products used in services; wide range of available treatments; ability to customize any treatment; changing room amenities; convenient parking; diversity of options for spa/salon, treatments, fitness, cuisine, education. Conversely, Canadian men are more likely than women to regard the availability of fitness equipment/activities as essential.

Importance of Products and Services

The three products or services that are most important to spa-goers (in both countries) are the quality of products used in services, a wide range of available treatments and the ability to customize any treatment (Figure 35). Interestingly, Canadian spa-goers tended to identify more products and services as "essential" than did Americans, suggesting that Canadians might have higher standards for their spa-going experiences.

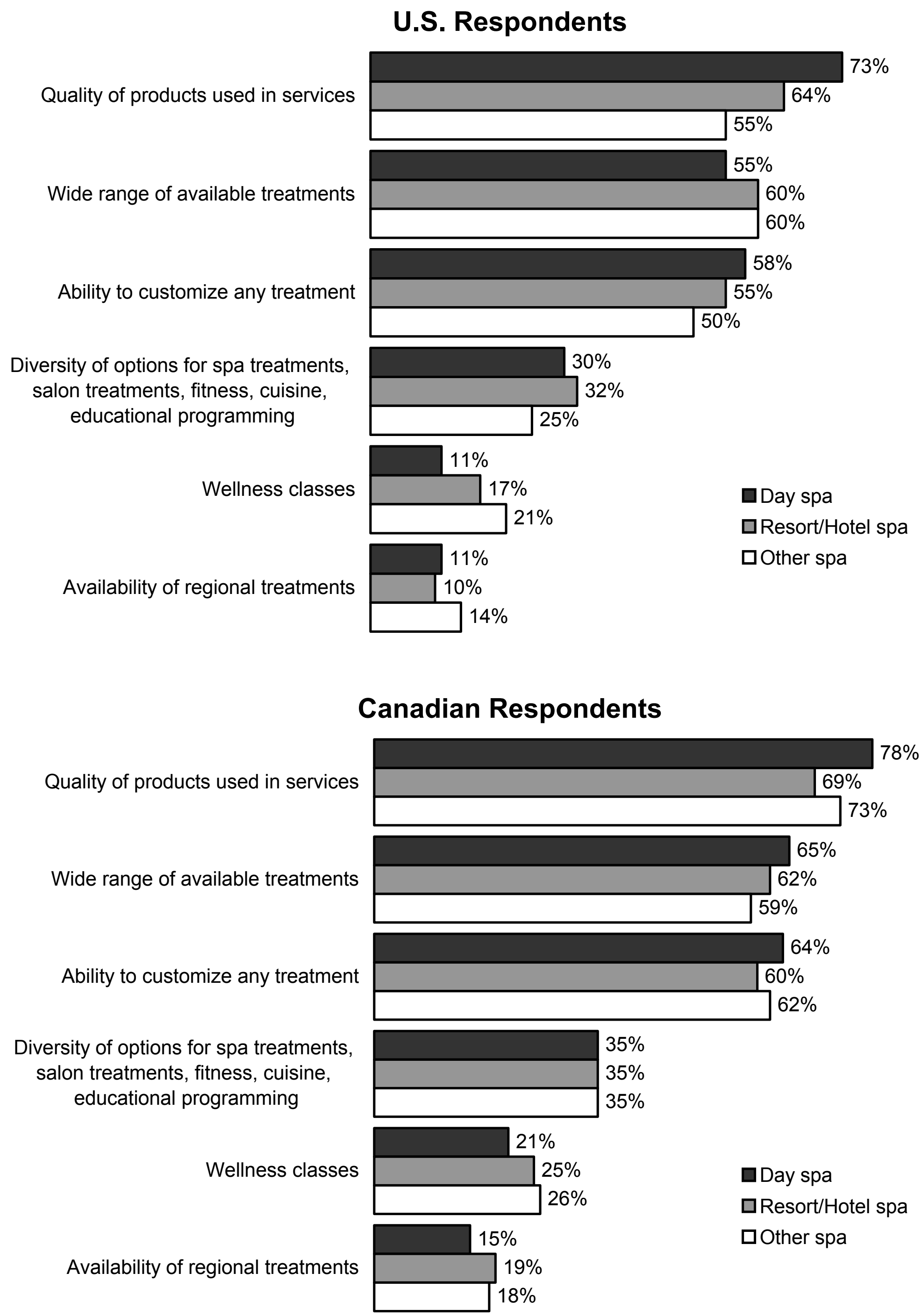
Figure 35
Which Products and Services Are Essential to Your Enjoyment of a Spa Experience at the Type of Spa You Last Visited?



Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

The most notable finding across spa types is that, with one slight exception ("Wide range of available treatments" in other spas), Canadians were always more interested in a product/service than were their U.S. counterparts, *regardless of spa type* (Figure 36). Again, it appears that Canadians tend to hold higher standards when visiting a spa, regardless of its type.

Figure 36
Which Products and Services Are Essential to Your Enjoyment of a Spa Experience at the Type of Spa You Last Visited (By Spa Type Last Visited)?

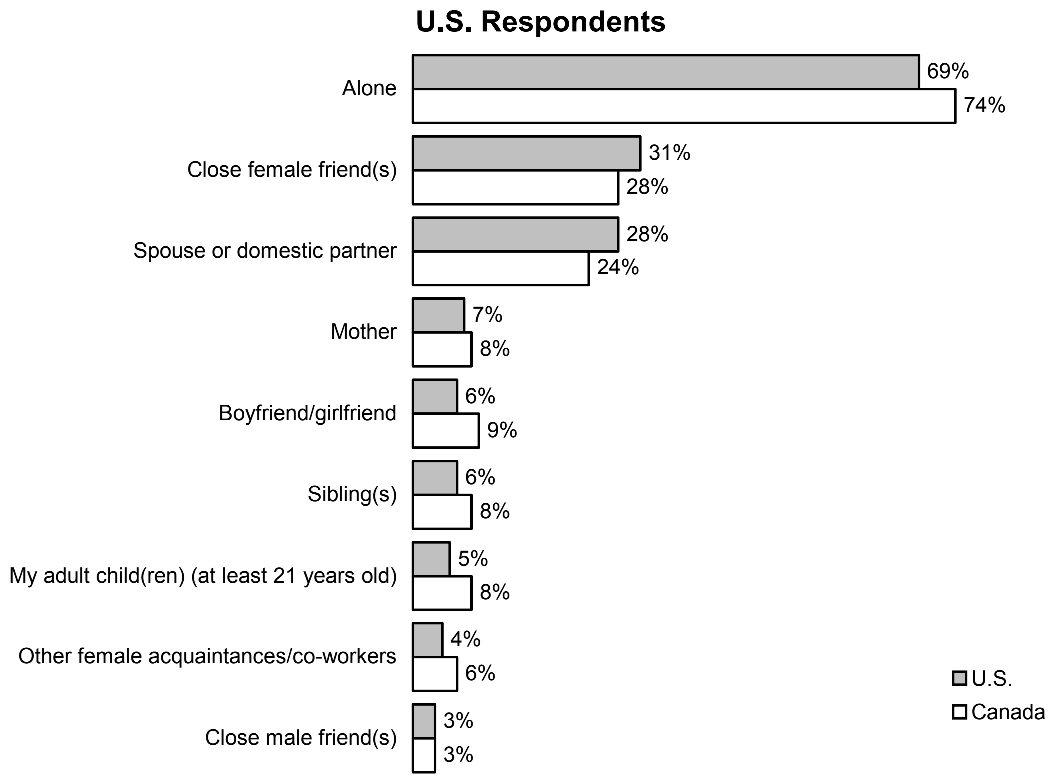


Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Typical Accompanying Parties

Generally, spa consumers in both countries most often go to spas alone. When not visiting spas alone, spa-goers are most often accompanied by a close female friend (or friends) or their domestic partner, including spouses (Figure 38). Only a small percentage of spa-goers typically go to spas with any other friends or relatives.

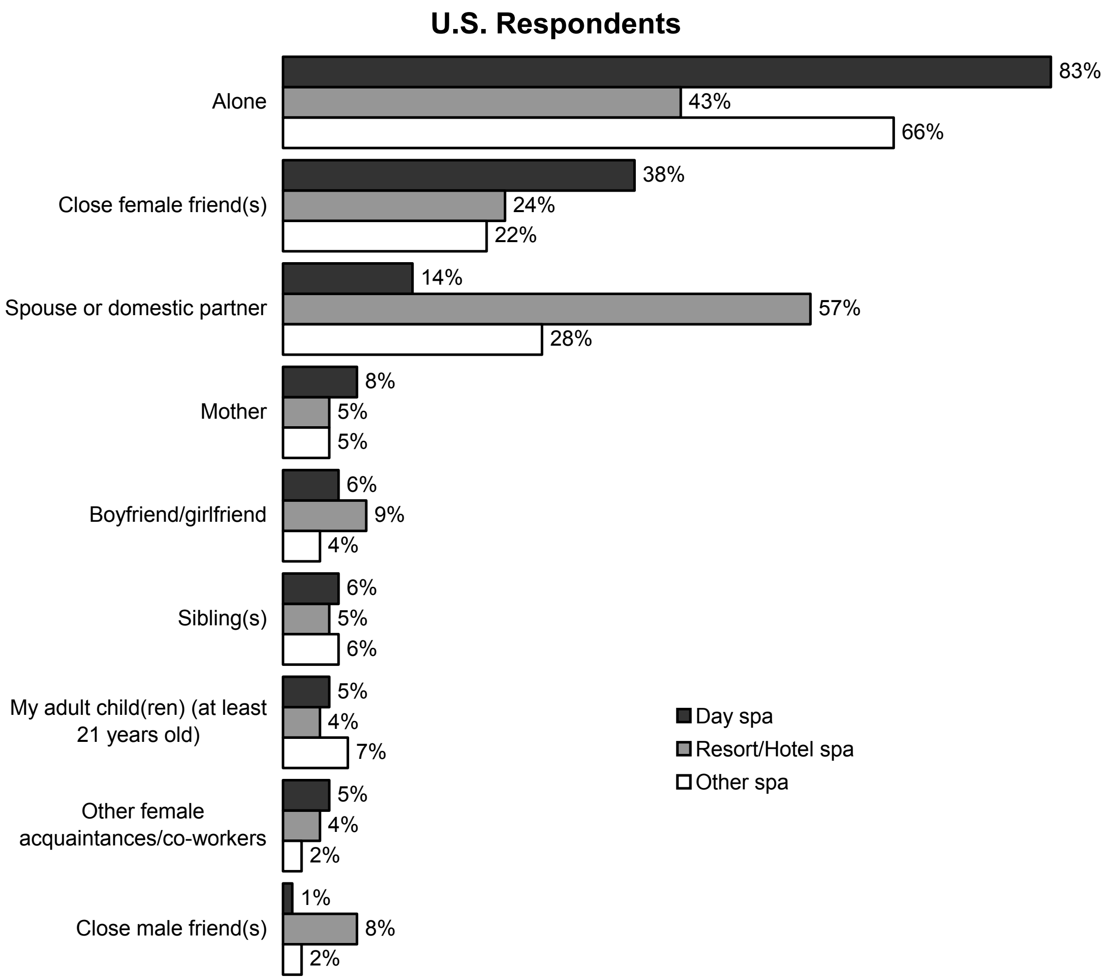
Figure 37
With Whom Do You Typically Go to a Spa (at the Type of Spa You Last Visited)?



Note: Accompanying parties not displayed and selected by less than 3% are minor children (less than 21 years old), father, and other mail acquaintances/co-workers).
Source: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

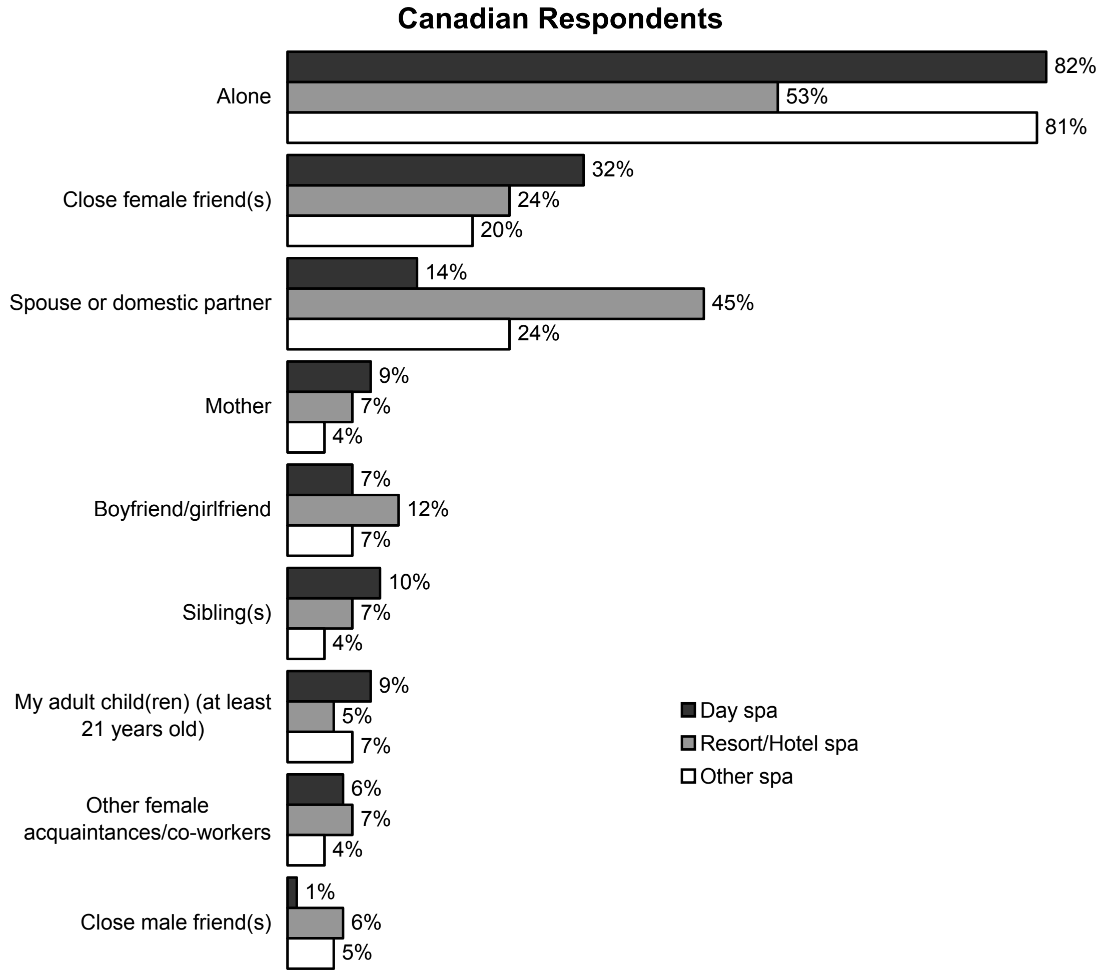
But when we break the numbers down by spa type, we discover an exception to this general pattern. When Americans visit resort/hotel spas, they are most likely to be accompanied by a spouse or domestic partner. Overall, spa-goers who don't visit alone are most likely accompanied by at least one close female friend (day spas) or a spouse or domestic partner (other spas) (Figure 38).

Figure 38
With Whom Do You Typically Go to a Spa (at the Type of Spa You Last Visited)?



Note: Accompanying parties not displayed and receiving no more than 3% in each spa type are minor children (less than 21 years old), father, and other male acquaintances/co-workers).
Source: U.S. results based on 1707 respondents.

Figure 38 (continued)
With Whom Do You Typically Go to A Spa (At the Type of Spa You Last Visited)?



Note: Accompanying parties not displayed and receiving no more than 3% in each spa type are minor children (less than 21 years old), father, and other male acquaintances/co-workers).
Source: Canadian results based on 1909 respondents.

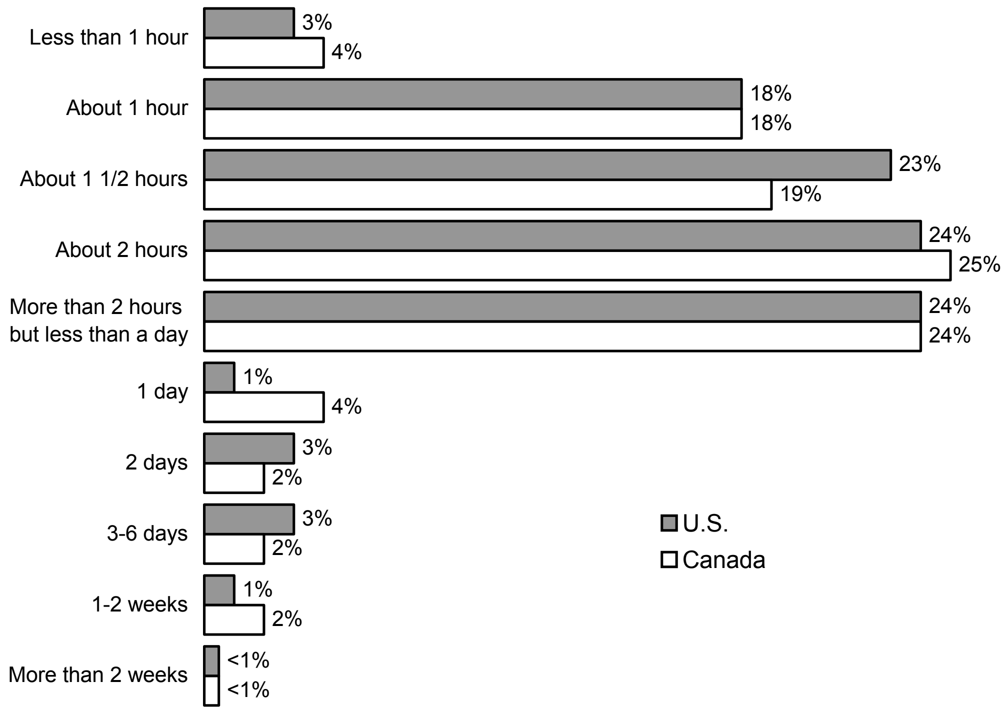
Typical Accompanying Parties: Gender Differences

Two notable findings from the previous charts (Figure 38) are (1) the high likelihood of spa-goers being accompanied by their spouse or domestic partner, especially to a resort/hotel spa, and (2) the appearance – albeit low – of spa-goers being accompanied by close male friends. But when we distinguish these patterns by gender, it becomes clear that it is male spa-goers who are much more likely than females to be accompanied by a spouse (or domestic partner) or close male friend.

Time Spent at a Spa

A clear majority of all spa-goers (65% in U.S., 62% in Canada) spent between one and two hours at the last spa they visited (Figure 39). Another one-quarter (24%) in each country spent more than two hours but less than a day. No more than 10% (8% in U.S., 10% in Canada) spent at least one full day at the spa.

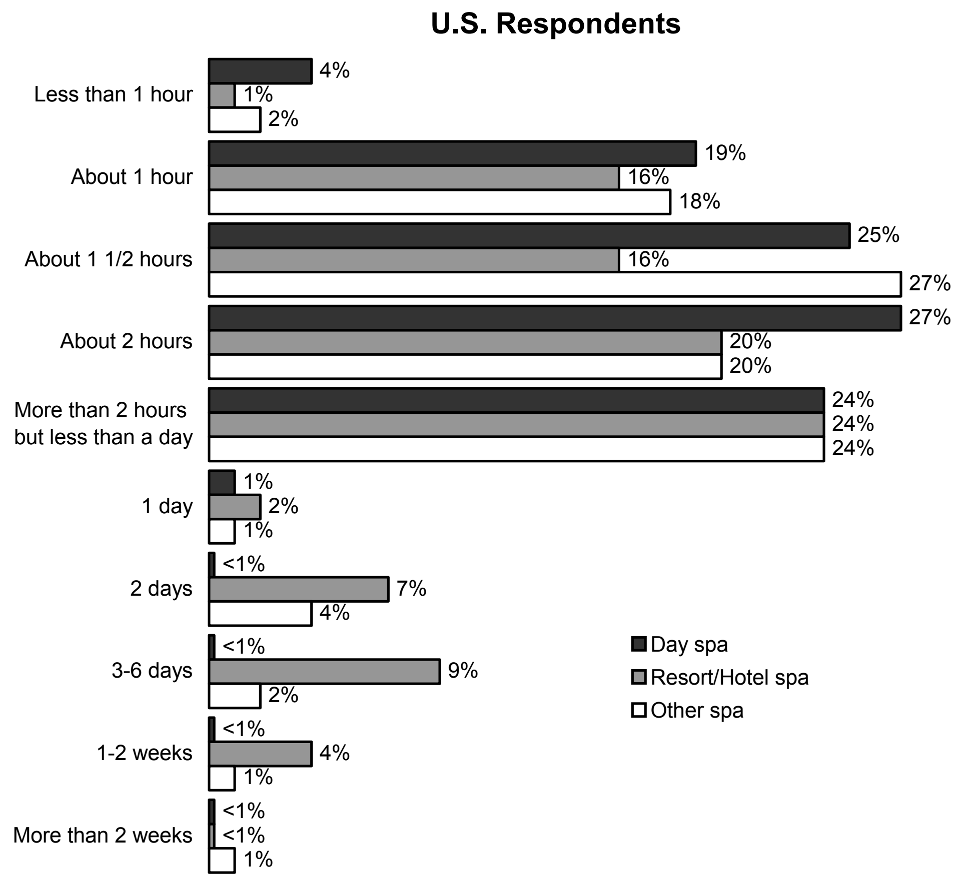
Figure 39
Time Spent at Last Spa Visited



Note: Percentages may not total to exactly 100% due to rounding.
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

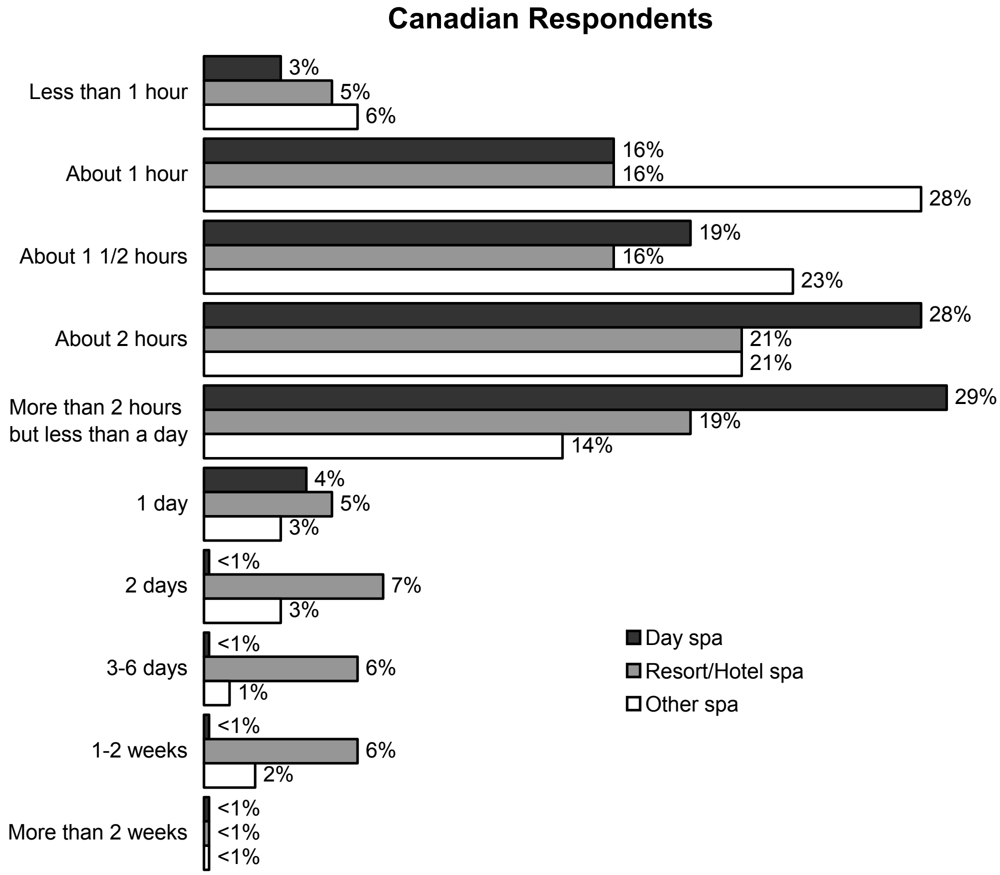
Naturally, the amount of time spent on a spa visit will differ significantly depending on the type of spa, but also, in some instances, by the consumer's country. For example, substantial minorities (46% of Americans, 43% of Canadians) who last went to a resort/hotel spa spent more than two hours there (Figure 40). But notably fewer (one-third of Americans and 23% of Canadians) spent more than two hours at "other" spas they last visited. And only a quarter of Americans and one-third (34%) of Canadians spent that long at the day spa they last visited. While the inter-country differences in time spent at other spas might well be due to differences in the types of "other" spas visited, it does appear that Canadians have a tendency to stay longer on day spa visits than do their American counterparts.

Figure 40
Time Spent at Last Spa Visited (By Spa Type)



Note: Percentages may not total to exactly 100% due to rounding.
Source: U.S. results based on 1707 respondents (890 day spa, 457 resort/hotel spa, 360 other spa).

Figure 40 (continued)
Time Spent at Last Spa Visited (By Spa Type)



Source: Canadian results based on 1909 respondents (1118 day spa, 529 resort/hotel spa, 262 other spa).

Purchasing of Spa Products

With the rise in interest in a wider range of spa treatments, consumers have gained greater appreciation for spa quality products. Personal care and beauty products have enjoyed more notice in recent years, which has made spa products all the more relevant to consumers. At issue for spas, however, is whether increased interest has resulted in increased purchases. In Table 7, we find a mild increase from 2003 to 2005 if we restrict our attention to spa purchase intentions. That is, any increase in purchases appears to be of most benefit to retailers outside of (or very peripherally attached to) the spa world.

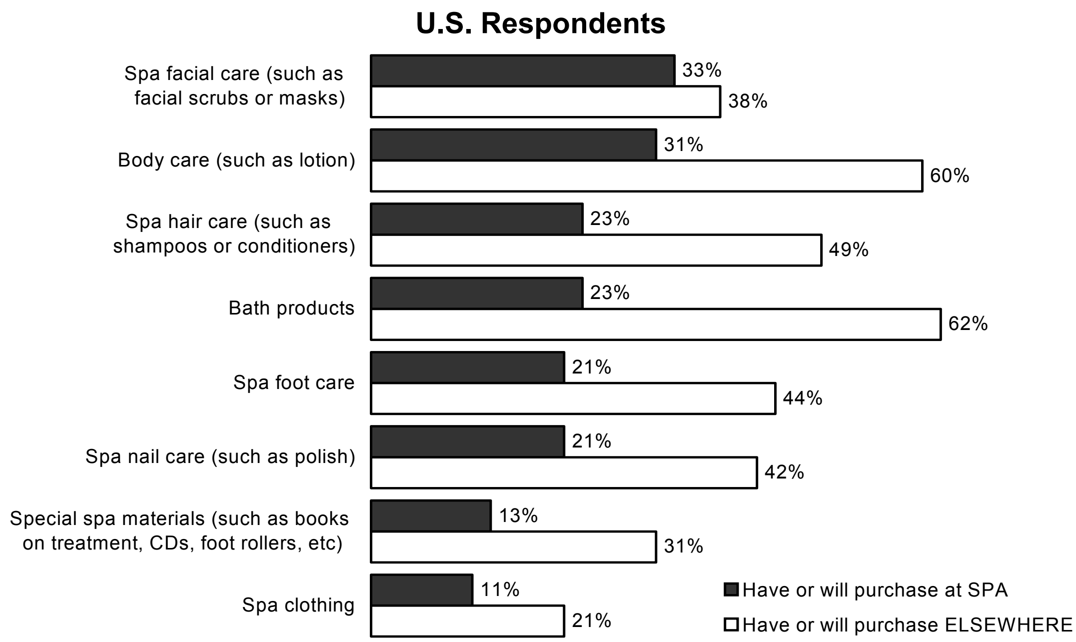
Table 7
Spa Products Purchased or Will Purchase, 2003 and 2005

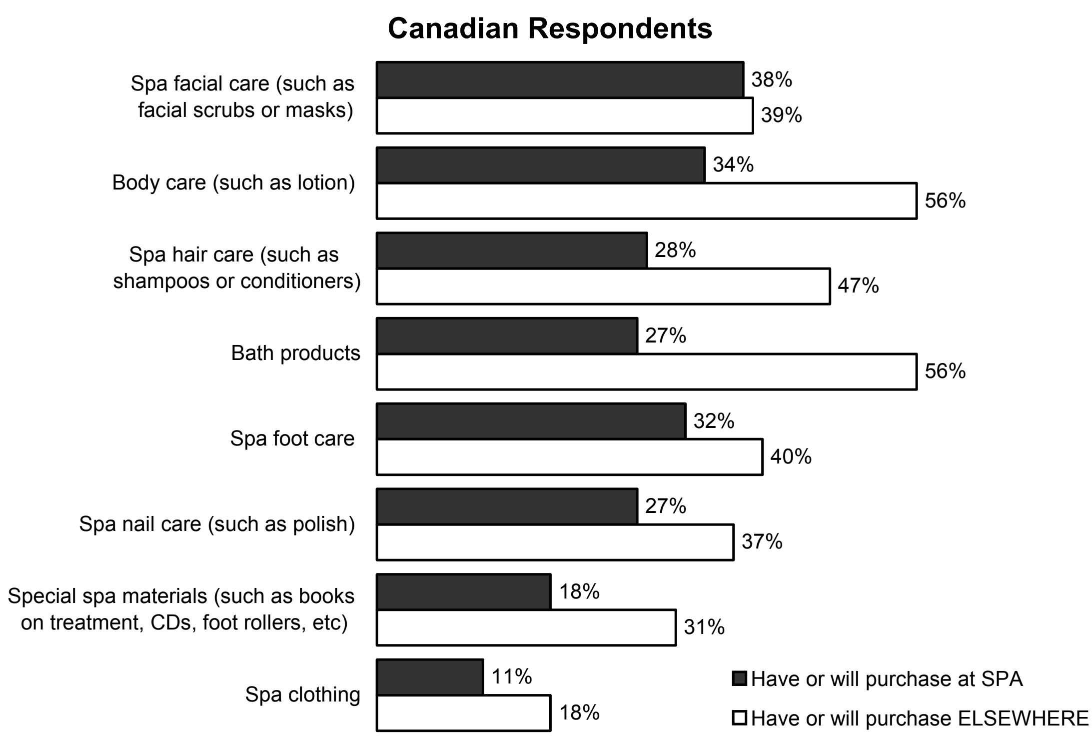
		2005	
	2003*	At Spa	Elsewhere
Spa hair care (such as shampoos or conditioners)	27%	23%	49%
Spa facial care (such as facial scrubs or masks)	26%	33%	38%
Spa body care (such as lotion)	22%	31%	60%
Spa foot care	18%	21%	44%
Spa nail care (such as polish)	15%	21%	42%
Special spa materials (such as books on treatment, CDs, foot rollers, etc)	9%	13%	31%
Spa clothing	7%	11%	21%

*** Retail location (i.e., whether at spa or elsewhere) not specified in 2003.**
Data are for U.S. residents only.
Sources: 2003 results based on 1201 respondents, 2005 results based on 1707 respondents.

It would seem natural to suggest that spas need to become more aggressive at marketing products in order to take advantage of this potential opportunity. Looking at where U.S. and Canadian spa-goers currently purchase spa products, we find quite similar patterns in the types of spa products they purchase, whether at a spa or elsewhere (Figure 41). The two products most commonly purchased at spas (by both sets of consumers) are facial care products and body care products. Notable differences are that U.S. spa consumers are somewhat more likely than Canadians to buy bath products elsewhere, while Canadians are more likely than Americans to purchase foot care products at spas.

Figure 41
Which Types of Spa Products Have You Purchased/Will You Purchase, at Either a Spa or Somewhere Else?

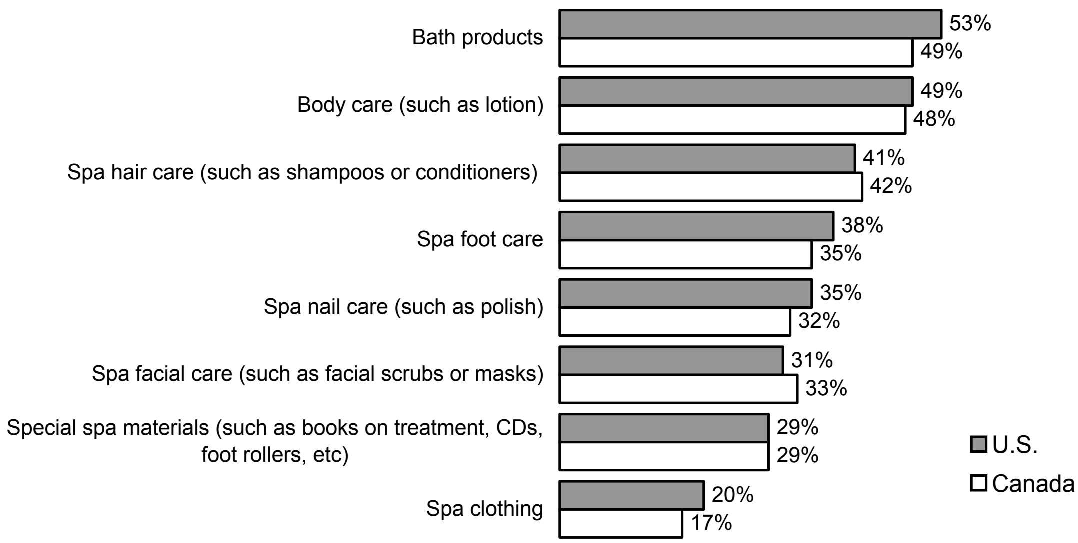




Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Perhaps the best way to assess spas' opportunity to increase their sales of these products is to look to the spa-goers who buy spa products *but not at a spa*. The percentage of spa-goers who have bought, or plan to buy, particular spa products only at establishments other than a spa is highest for bath products and body care products (Figure 42). In other words, these are the products that many spa-goers want, but are not purchasing at the spas they visit. Such products would appear to have the greatest potential for expanding spas' sales of spa-related products.

Figure 42
Percent Who Have Purchased/Will Purchase Spa Products, But Not at a Spa
(By Type of Product)



Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Purchasing of Spa Products: Choice of Channels

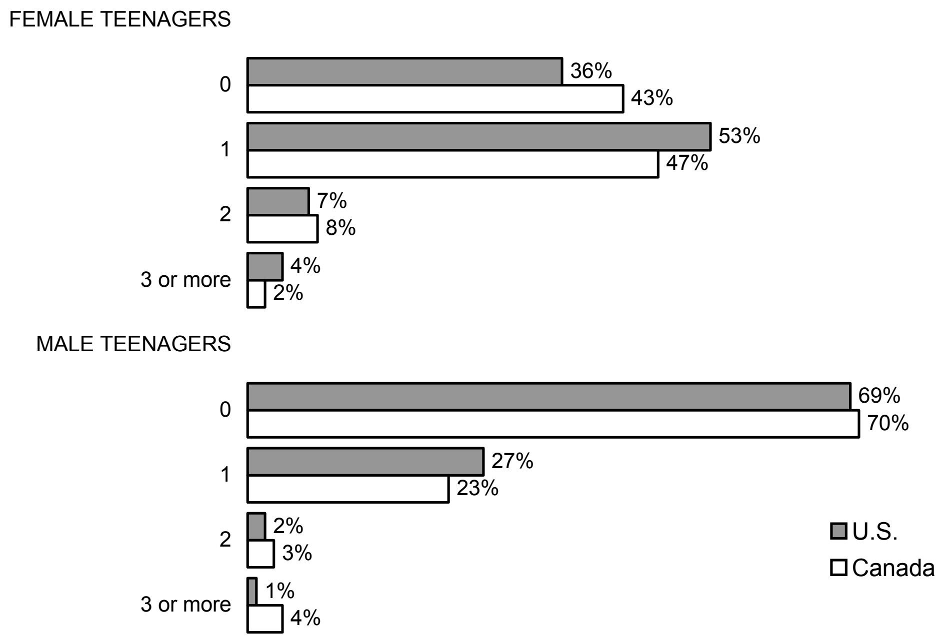
Another finding to consider is that there is very little overlap in the locations (or "channels") in which spa-goers purchase these products. In other words, the percentage of spa-goers purchasing a particular type of spa product at *both a spa and elsewhere* is quite low, ranging from 9% (in both countries combined) for body care products down to 1% for spa clothing. These low numbers of spa-goers buying spa products through multiple channels (i.e., both at spas and elsewhere) suggest that most consumers are making a sharp distinction between these channels. Those currently buying spa products outside of spas will need to be convinced (through emphasis on quality and breadth of products, knowledge of salespersons, etc.) that spas are not just *another* channel through which to purchase such products, but the *best* channel for doing so.

Teenagers' Use of Spas

To conclude our consideration of The Spa Experience, we turn to a particular group of spa-goers with its own ideas about what experiences spa visits should provide: teenagers.

Among spa-goers who have teenaged daughters living at home, majorities in both countries (nearly two-thirds in the U.S.) have seen at least one of those daughters visit a spa (Figure 43). The comparable figures for teenaged sons are predictably lower: In both countries, about 30% of spa-goers with teenaged sons at home have seen at least one of those sons visit a spa.

Figure 43
How Many of Your Teenaged Children (Aged 13-19) Living at Home Have Ever Visited a Spa?



Sources: U.S. results based on 184 respondents with teenaged daughters living at home and 165 respondents with teenaged sons living at home; Canadian results based on 261 respondents with teenaged daughters living at home and 273 respondents with teenaged sons living at home.

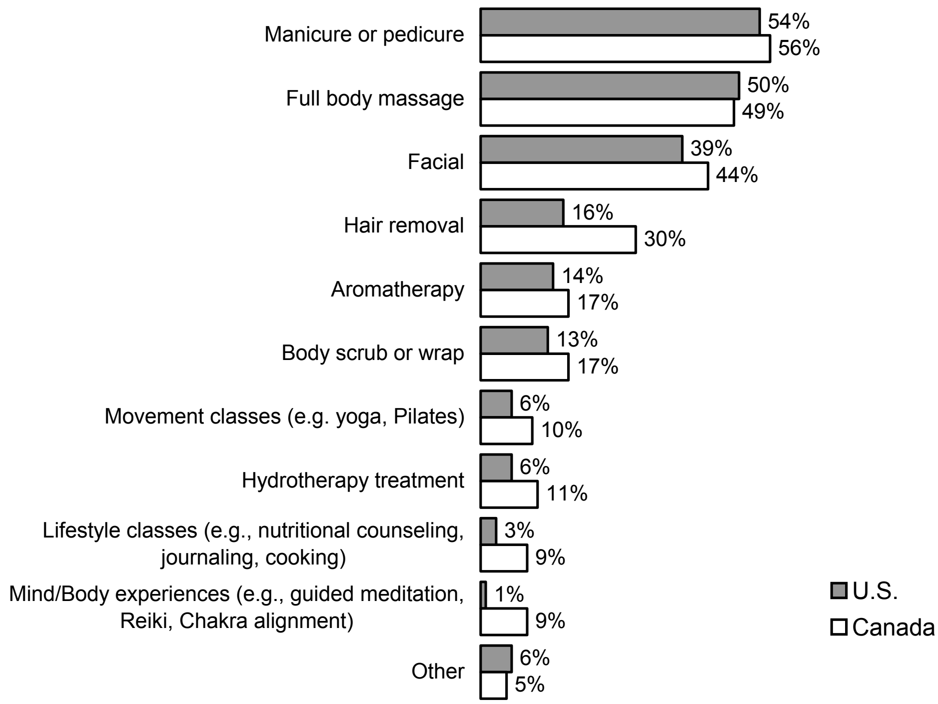
Teenagers as Spa-goers

The volume of spa visitors these teens represent is sizable. Among U.S. spa-goers the number of teens who go to spas is nearly four million (3.9 million) and in Canada, spa-goers with teenagers account for just over half a million (.6 million) teen spa-goers. Not counted here are teen spa-goers from households in which no parent is also a spa-goer. Catering to these young spa-goers is unlikely to be the same as satisfying more mature spa-goers. They are less motivated by health or aging triggers than older spa-goers and more interested in managing appearance. Far from being superficial spa-goers, however, teen spa-goers can be expected to explore different treatments and services over time as much as any other spa-goer. Importantly, appealing to the teen spa-goer has the potential to pay large dividends through long-term repeat business.

In both countries, the most common treatments received by teenaged spa-goers are the most popular treatments of spa-goers overall: manicure/pedicure, full body massage and facial (Figure 44). The next most common treatment – hair removal – is more popular in Canada than in the

U.S. In fact, overall, the range of treatments received by teenagers is more diverse in Canada than in the U.S.

Figure 44
What Services Have Your Teenaged Children (Aged 13-19) Received at Spas?



Sources: U.S. results based on 148 respondents with teenaged children living at home who have visited a spa; Canadian results based on 199 respondents with teenaged children living at home who have visited a spa.

APPENDIX I

Methodology

This report presents results from an online survey conducted in December 2005 and two omnibus telephone surveys conducted in September 2005 to understand consumer attitudes and behaviors related to spa vacations. Two separate samples, one for the U.S. and one for Canada, were used with both survey methods. The samples for both countries received the same survey (with country-specific questions for ethnicity and area of residence). Methodological details of how the data were collected and how key measures were developed are provided here.

Sampling Frame

The main samples for this study were drawn from a panel of consumers with online (i.e., Internet) access in December 2005. Therefore, the populations sampled are a subset of the national populations of the U.S. and Canada, the two countries examined in this research. Over the years, the population of Internet users has grown and extended to households from every walk of life and in every region of the world. Nowhere is this expansion more complete than in the U.S. and Canada. As a result, online samples for these two countries are generally considered to be nationally representative of their respective national populations.[18]

Because day spa use is much more common than use of other spas, quotas were established to increase representation of the use of other kinds of spas. In particular, quotas were used for day spas and resort/hotel spas. In addition to these quota groups, a third category for all other spa types was created. The three quotas for each country were as follows:

- 400 day spa-goers
- 600 resort/hotel spa-goers
- 600 other spa-goers

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[18] In fact, online samples tend to outperform many other methods in their ability to reach a diverse consumer population. Telephone surveys, for example, must contend with the widespread practice of screening calls. The use of caller ID and answering machines has reduced response rates to telephone surveys to extremely (in some cases, unacceptably) low levels. Mail surveys, which rely on consumer panels enjoy response rates comparable to online surveys, but the technology of online surveying enables researchers to craft more complex survey instruments or, as was the case with this survey, to control respondent access to questions. Thus, the order of presentation can be strictly enforced and irrelevant questions can be hidden. With mail surveys, the logical flow of questions is under the control of the respondent. For these reasons, online surveys are quickly becoming the standard against which other methodologies are compared.

The total sample desired for each country was 1600 respondents. The actual study samples, however, contained slightly greater numbers of respondents for each quota group and, therefore, for the totals. In any case, the only effect of exceeding the target sample size is a negligible increase in the accuracy of estimates taken from the samples, since any increase in sample theoretically reduces the overall sampling error. The nominal error for a sample of 400 is less than ±4.9 percentage points at the 95% confidence level. The larger groups of 600 have correspondingly less error; namely, no more than ±4 percentage points at the same 95% confidence level.

To ensure that sampling consumers with ready access to the Internet does not unduly skew the estimates of spa use, large-scale omnibus surveys administered via telephone in September 2005 were used to determine use of spas by the general population of each country. Each of the two surveys recorded responses from 2000 adults using a random digit dialing method.[19] Respondents to the telephone omnibus surveys were contacted between September 15 and 19, running from Thursday night to Monday night.[20] This coverage eliminates bias caused by restricting contacts to times of the day in which certain classes of individuals, such as full-time employed persons, may be unavailable.

The results of the two omnibus surveys were used to create post-stratification weights for the two corresponding online samples. The weights adjust for age, gender and type of spa used by respondents in the online surveys. Age and gender are the two characteristics most often misrepresented in online surveys, which tend to over-represent females and younger adults, when compared to the general population. These two demographic characteristics were matched to the census figures of each country, and the use of different spa types was adjusted to correct for the quota sampling.[21] Estimates of spa use taken from the omnibus surveys are reported in Chapter II.

Identifying the Spa-Going Population

As this is a study of spa-goers, the survey had to screen out consumers who are not active users. For the purposes of the study, an active spa-goer is someone who has visited a spa in the past 12 months for more than a manicure or pedicure. Trips to a gym that offers massage, whirlpool and other services are explicitly excluded unless part of a club spa.

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[19] The U.S. omnibus survey, conducted by Opinion Research Corporation, contained a national sample of 2063 adult Americans. The Canadian omnibus survey was administered by Maritz Research and contained a national sample of 2001 adult Canadians.

[20] The Canadian omnibus ran longer, until Wednesday, September 21.

[21] In pre-screening for the online survey, individuals who did not visit a spa were not invited to take the survey. The screening also considered the quota sampling plan. Thus, the research samples themselves could not be used to accurately estimate use of the different spa types. Nevertheless, data collected during the screening process indicate the panel used to draw the online samples is as representative of spa use as the omnibus. That is data on spa types used by the online panel appear equal to the omnibus results, within the margin of sampling error.

Two questions were used to identify spa-goers. The first question asked:

In the past 12 months, how many times have you visited the following places?

- Day spa
- Resort/Hotel spa
- Cruise ship spa
- Club spa
- Medical spa
- Destination spa
- Mineral springs spa

A spa-goer had to have made at least one trip to at least one of the seven spa types to qualify. In addition to making a spa visit, we also required study participants to have experienced more than a manicure or pedicure. We asked:

At the place(s) you indicated visiting in the past 12 months, which of the following services did you experience?

- Full body massage
- Manicure or pedicure
- Facial
- Body scrub or wrap
- Aromatherapy
- Hydrotherapy treatment
- Mind/Body experiences (e.g., guided meditation, Reiki, Chakra alignment)
- Lifestyle classes (e.g., nutritional counseling, journaling, cooking)
- Movement classes (e.g. yoga, Pilates)

To qualify, the respondent had to indicate at least one treatment other than or in addition to "manicure or pedicure."

In addition to these qualifying questions, we asked if the respondent had "been to an establishment that offers at least two of the following three kinds of services (e.g., massage + body treatments, skincare + body treatments): massage (full body), skincare treatments (e.g., facials), body treatments (e.g., hydrotherapy or body wraps/scrubs)." Interestingly, about 6% of those in the final sample indicated that they had not, despite the fact that the establishment described in the question defines a spa. Evidently, a small minority of spa-goers is not fully aware of what constitutes a spa. A closer look reveals that most of the 6% say they went to a day spa or a resort/hotel spa, which are the two most popular spa types.

APPENDIX II

Spa Use in the U.S. and Canada: THE SALIENT DIFFERENCES

Throughout this report we strive to point out notable differences between the U.S. and Canada in terms of their spa-goers and spa-going experiences. Listed below, as a convenient summary, are the key U.S./Canada differences found in the study.

Duration as a Spa-goer

U.S. spa-goers have on average been going to spas longer than their Canadian counterparts. While 71% of U.S. spa-goers have been going to spas for at least 3 years, only 57% of Canadians make that claim. And while only 15% of U.S. spa-goers are newcomers in their first year of spa-going, a full one-quarter (26%) of Canadian spa-goers are in their first year.

Duration as a Spa-goer: Age Differences

Notably, in the U.S. but not Canada, there is a sizable portion (15%) of older users (ages 55 and over) who are long-time spa users, visiting spas for more than 20 years. In fact, just over one-quarter (26%) of older users in the U.S. have been visiting spas for at least 13 years. Conversely, 21% of older users in Canada report going for the first time in the past year. .

Gateway Spas

While spa-goers in both countries are most likely to enter the spa world by visiting a day spa, U.S. consumers are more likely than Canadian consumers to experience a resort/hotel spa as their first spa (33% and 22%, respectively), while at least some Canadians (6%) first go to a medical spa, a pattern currently almost non-existent in the U.S.

Type of Spa Last Visited

Another way to compare the popularity of spa types is to assess which type of spa has been visited more recently by each respondent. Using this classification, day spas are again clearly the most popular type of spa in both the U.S. and Canada, followed by resort/hotel spas. But among the remaining spa types, U.S. spa-goers tend to favor cruise ship spas (with 8% visiting most recently), while Canadians prefer medical spas (6%).

Recent Changes in Types of Spas Visited

Visits to club spas have fallen sharply in both countries since 2003. Interestingly, the drop in club spa visits was made up by visits to others kinds of spas in differing ways in the U.S. and in

Canada. Canadian spa-goers increased (by four times) their propensity to visit resort/hotel spas. U.S. spa-goers, on the other hand, favored day spas while in Canada spa-goers decreased their day spa visits. In addition, U.S. spa-goers decreased their use of medical spas while Canadians were increasing their use.

Gateway Spa Services

While full-body massage is the most common spa treatment initially experienced by spa-goers in both countries, this is much more true in the U.S. (where 68% of spa-goers experienced it first) than in Canada (45%). Manicures and pedicures are about twice more likely to be gateway treatments for Canadians than for U.S. consumers.

Spa Services Experienced

While the popularities of specific spa treatments are strikingly similar in both countries, Swedish massage is more popular in the U.S. Other notable differences are that deep tissue massage is more popular in the U.S. than in Canada, while energy work (such as Reiki and reflexology) enjoys more popularity in Canada than in the U.S.

Spa Services Experienced: Gender Differences

While male spa-goers in both countries are more likely than female spa-goers to have received a Thai massage, Canadian men don't stop there. Among Canadian spa-goers, men are also more likely than females to experience Tai Chi and the following additional types of massages: Swedish full-body, deep tissue, Shiatsu and couples.

Spa Services Experienced: Age Differences

While there are few significant differences in use of spa treatments by age, older U.S. spa-goers (those 35 or over) are significantly more likely than younger users to attend lifestyle classes, a difference not found in Canada. But in Canada, middle-aged spa-goers (those aged 35-54) are significantly more likely than other age groups to choose deep tissue massage, while older spa-goers (aged 35 and over) are more likely than younger users to engage in energy work.

Recent Changes in Use of Spa Services

Manicures, pedicures, facials and sauna/steam baths have all grown in popularity in both countries since 2003. Body scrubs/wraps (especially in the U.S.) and aromatherapy (especially in Canada) have also increased in popularity.

Prevalence of Spa Travel

U.S. spa-goers are more likely to visit a spa while traveling than are their Canadian counterparts. While nearly two-thirds (63% or 20.4 million) of U.S. spa-goers visited a spa while on an out-of-town, overnight trip in the past year, not quite half (49% or 1.8 million) of Canadians did so.

Spa Visits While Traveling

In 2005, nearly two-thirds (63%) of U.S. spa-goers went to a spa when away from home, on vacation or traveling for business, while about half (49%) of Canadian spa-goers did.

Favored Spa Facility Types

Among spa-goers who visit spas while traveling, resort/hotel spas are far and away the most favored spa type while traveling. The next most popular facility type, especially among Canadians, is a day spa affiliated with, near or recommended by the place where they are staying.

Preferred Destinations

While most (68%) of the U.S. spa travelers prefer spa vacation destinations that included domestic spas, less than half (45%) of the Canadians feel the same way. (Still, among both groups of travelers, domestic spas are the most popular destination choice, followed by Mexico/Caribbean.)

Motivations for Visiting Spas

While U.S. and Canadian spa-goers agree on most of the primary reasons for which they go to a spa, U.S. spa-goers are more likely than Canadians to cite stress reduction. Meanwhile, Canadians are more likely than Americans to select the following reasons: feel better about myself, improve my appearance, contribute to overall wellness, and recover from injury.

Hindrances to Increased Usage

While day spa consumers are especially likely to regard expenses as a problem, U.S. consumers cite the secondary factors (too indulgent, inconvenient locations, unclear expectations) with about equal frequency (depending on spa type). But Canadian consumers who last visited a resort/hotel or other spa are disproportionately likely to cite a lack of convenient locations.

Advance Times for Planning Visit

While there was considerable variation in how far ahead consumers started planning their most recent spa visit, women, especially in Canada, plan their spa visits farther in advance than do men.

Spending Alternatives

While sizable minorities of both U.S. and Canadian consumers selected spa visits, dining, shopping and travel as activities on which they are likely to spend discretionary income, some differences exist. U.S. consumers are more likely than Canadians to spend extra cash on travel, while Canadians are more drawn to movies than are their U.S. counterparts.

Interest in Innovative Spa Types: Age Differences
As would be expected, there are considerable differences across age in the interest in some types of specialty spas. In Canada, but not the U.S., younger Canadians show more interest than older spa-goers in several types of spas: country club, pet friendly and teens-only.

Benefits Sought by Spa Consumers
U.S. and Canadian spa consumers concur on the top five benefits they seek on most spa visits: relaxation, calm/quite/peacefulness, pampering, time out for themselves, and refreshment. But Canadian spa-goers are significantly more likely than U.S. consumers to seek/value the following qualities: energized, maintaining appearance, journey and rebirth.

Benefits Sought: Age Differences
Among U.S. spa-goers, practically no spa benefit is valued more often by one age group than another. But in Canada, several benefits stand out as being more valued by younger spa-goers than their older counterparts: rejuvenated/renewed, escape, release/time-out, fun and young/youthful.

Marketing Effectiveness Across Spa Types
In both countries, the three most effective marketing strategies – gift certificates, advertised sales and complimentary bonus services – will be more effective when used for day spas and least effective when used for "other" spas. But in Canada, this pattern also holds true for offering complimentary accessories. In the U.S., one strategy that will be more effective for other spas – especially club spas and medical spas – is being certified by an independent body.

Trusted Information Sources
When seeking information on which spas to visit, consumers (in both countries) are most likely to trust friends, followed by family members and coworkers. Interesting differences across countries are that Canadians spa consumers are more likely than Americans to trust doctors and local newspapers for spa information, while Americans are more likely than Canadians to trust travel magazines.

Treatments Experienced
While U.S. and Canadian spa consumers have similar histories in terms of treatment experienced, U.S. consumers are considerably more likely than Canadians to have experienced Swedish massage, including within the past year.

Consumer Familiarity with Treatments

U.S. spa consumers know, or at least claim to know, more about spa treatments than do their Canadian counterparts. The percentage of spa-goers claiming familiarity with a particular treatment ("sufficient knowledge…to know what to expect") tends to be higher among Americans. In particular, U.S. spa consumers are more likely (than Canadian consumers) to be familiar with the details of six specific treatments: pedicure, body scrub/wrap, and four types of massages (Swedish full-body, deep tissue, hot stone and couples). But Canadian spa consumers are more likely (than U.S. consumers) to be familiar with energy work (e.g., Reiki, reflexology).

Treatments: Familiarity vs. Exposure

It turns out that some types of treatments are better known than actual exposure would suggest, particularly in the U.S. For example, two and a half times as many U.S. spa-goers profess familiarity with lifestyle classes as have actually participated in such classes. Other treatments showing unexpectedly high familiarity (given their actual participation rates) in the U.S. are body scrub/wrap and hot stone massage. Only one treatment type shows a similar pattern of having much greater familiarity than exposure in Canada: lifestyle classes.

Interest in Medical Spa Treatments

Canadians show somewhat more experience with medical treatments, as well as more interest in trying them, than do their American counterparts. In particular, Canadians show somewhat more interest than do Americans in natural weight loss, laser hair removal, cellulite treatments and photofacial rejuvenation.

Importance of Customer Service

Regardless of country or spa type, the most important aspect of customer service for spa consumers is the availability of convenient treatment times. But there are differences as well. Staff hospitality and treatments starting on time are more important among day spa goers than with other spa types, especially in the U.S. Also, staff expertise and credentials are more important (across all spa types) among Canadian consumers than in the U.S.

Importance of Amenities and Features

Clearly the most important amenity or feature for spa consumers in both countries, regardless of spa type, is the atmosphere (ambience) in the spa. But among less vital features, Canadian consumers show more interest in a spa being eco-friendly than do U.S. consumers.

Importance of Amenities and Features: Gender Differences

Differences across gender about which spa amenities are essential vary largely by country. In the U.S., female and male spa-goers largely agree on which amenities are essential. But in

Canada, females and males have differing opinions. For example, Canadian men are more likely than women to regard the availability of fitness equipment/activities as essential.

Importance of Products and Services

Interestingly, Canadian spa-goers tend to identify more products and services as "essential" than do Americans, regardless of spa type, suggesting that Canadians have higher standards for their spa-going experiences.

Typical Accompanying Parties

Generally, spa consumers in both countries most often go to spas alone; an exception is when Americans visit resort/hotel spas: they are more likely to be accompanied by a spouse or domestic partner.

Time Spent at a Spa

Naturally, the amount of time spent on a spa visit will differ significantly depending on the type of spa, but also, in some instances, by the consumer's country. One interesting finding is that Canadians have a tendency to stay longer on day spa visits than do their American counterparts.

Purchasing of Spa Products

The two products most commonly purchased by spa-goers (in both countries) are facial care products and body care products. But U.S. spa-goers are somewhat more likely than Canadians to buy bath products elsewhere, while Canadians are more likely than Americans to purchase foot care products at spas.

Teenagers' Use of Spas

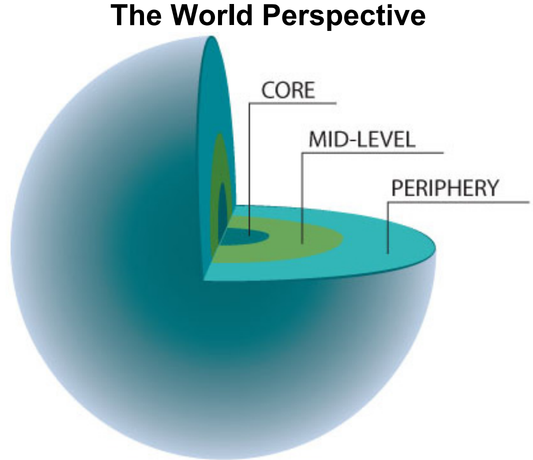
In both countries, the most common treatments received by teenaged spa-goers are the most popular treatments of spa-goers overall: manicure/pedicure, full body massage and facial. The next most common treatment – hair removal – is more popular in Canada than in the U.S. In fact, overall the range of treatments received by teenagers is more diverse in Canada than in the U.S.

APPENDIX

III The Hartman Model

The Hartman Model was developed with an understanding that a successful marketer needs to understand not only *who* their consumers are, but also *how* to engage them in a lifestyle proposition that results in purchase. Developing this understanding of consumers requires analysis of three key lifestyle components: how consumers live, how they shop and how they use the things they buy. Since the manner of participation in most activities is uniquely determined by the activities themselves, the drivers of live, shop and use differ significantly by lifestyle.

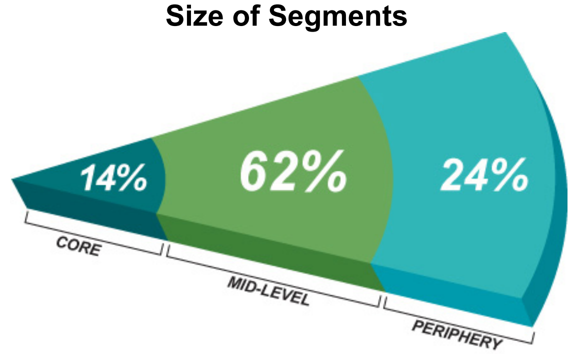
The World Perspective



The Hartman Group conducts consumer lifestyle analysis from what we term a “world perspective,” in which we can envision a center, the “Core,” as well as an outer edge, the “Periphery.” This in-depth lifestyle research combines traditional quantitative methods with innovative qualitative techniques drawing from sociology, anthropology and ethnography. The model adapts well to understanding how consumers live, shop and use in relation to the activities defining different product and service worlds.

The individuals and organizations in the Core are those most active in a given world of activity, while those at the Periphery are maintaining only minimal, infrequent and less-intense involvement with that world.

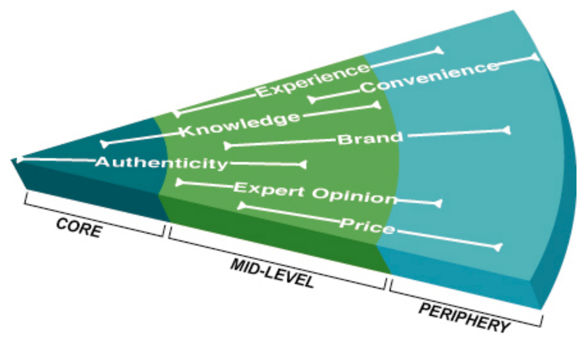
Size of Segments



Typically, the people and organizations comprising the center of a given world of activity are much smaller in number than those connected to the Periphery. Even larger is the Mid-level segment, where we find the majority of consumers.

Upon analyzing a world, we can identify "dimensions of consumption," which are the key attributes or influences that shape individual decisions in the marketplace. All of these dimensions are linked by a common world theme (e.g. spas) with different dimensions becoming more salient as a consumer moves from the Periphery to the Core. At the Periphery are familiar key buying factors, such as price, brand and convenience; while closer to the Core factors such as authenticity and knowledge become more important.

Dimensions Organizing a World of Activity



This model is used for our consumer research and analysis and can be adapted to include key dimensions of consumption identified as critical to understanding Core, Mid-level and Periphery consumers in any product or service world.

The Hartman Model's innovative "world perspective" offers more than simply a different way to approach market research. It provides us with insights that competing firms' methods do not. In at least two significant ways, our approach moves us closer to achieving client objectives than conventional practices. First, it allows us to classify consumer behavior in a way that addresses the need to understand varying levels of involvement in the world without having to resort to simplistic segmentation schemes. Second, it permits us to analyze attitudes and values separately from consumer behavior in order to gain a better understanding of the linkages between what consumers say and believe and what they actually do.

In contrast to our method of classifying behaviors, most consumer research attempts to group or cluster consumers into a small number of segments with supposedly similar demographic or psychographic profiles. While this type of segmentation does a reasonable job of identifying the most obvious response patterns to survey questionnaires, it rarely captures meaningful consumer behavior, because it fails to represent consumer behavior as social and subject to influences that attitudinal statements do not adequately describe. Our model provides us with a context for designing, analyzing and interpreting qualitative research that is absent from standard methods of consumer research. By focusing on the occasions or situations that consumers engage in as part of a world of activity, we can assess the intensity or depth of usage without having to artificially attribute a given level of involvement to a fixed type of consumer.

With regard to the second benefit of our approach, we have found, as have many other market researchers, that consumers often say one thing and do another. In part, this reflects the difficulty of using general attitudinal data to explain or account for specific behaviors. At the same time, the attitudes expressed in surveys and in face-to-face discussions can provide important clues to general values and beliefs that significantly color the way that consumers relate to products, services and promotional messages. By not assuming a one-to-one correspondence between what people say and what they do, we can distinguish between what appeals to different sensibilities and what affects purchase decisions. In other words, we neither accept blindly nor dismiss out of hand what consumers say. Rather, we recognize attitudes for what they are—indicators of values and interests that may find expression in actual behavior under certain circumstances. The Hartman Model enables us to identify and understand the conditions that bring about these circumstances.