

ISPA 2008 Global Consumer Study



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Study Timelines and Definitions

Europe											
Austria		France		Germany		Italy		Spain		UK	
											
Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End
Sept 12 th	Sept 28 th	Sept 24 th	Oct 1 st	Sept 19 th	Oct 1 st	Sept 17 th	Oct 1 st	Sept 23 rd	Oct 1 st	Sept 12 th	Sept 19 th

Asia-Pacific						North America			
Australia		Japan		Singapore		Canada		USA	
									
Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End
Sept. 22 nd	Oct 4 th	Sept 19 th	Oct 2 nd	Sept 12 th	Sept 30 th	Sept 17 th	Sept 29 th	Sept 5 th	Sept 17 th

Internet Population*							
China		India		Russia		Thailand	
							
Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End
Sept 22 nd	Sept 30 th	Sept 17 th	Oct 2 nd	Sept 24 th	Oct 1 st	Sept 25 th	Oct 4 th

Spa

A spa is defined as offering at least TWO of the following services:
 Massage (e.g., full body)
 Body Treatments (e.g., hydrotherapy or body wraps/scrubs)
 Skin Care Treatments (e.g., facials)

Active Spa-goer

A person who has attended a spa in the past 12 months

Inactive Spa-goer

A person who has attended a spa before, but has not been to a spa in the past 12 months

Non-spa-goer

A person who has never attended a spa

* Convenience sample, see next page

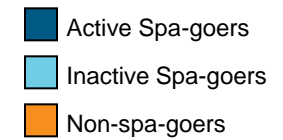
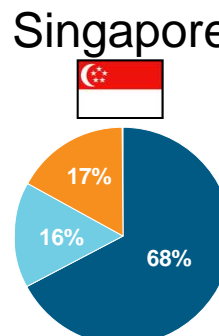
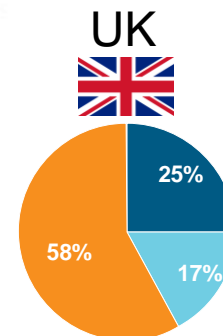
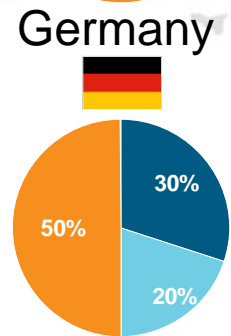
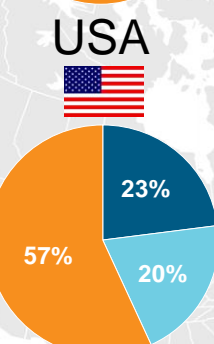
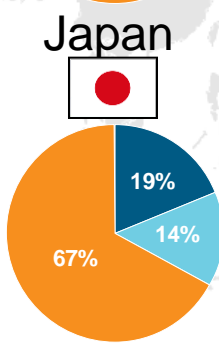
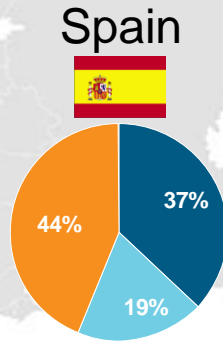
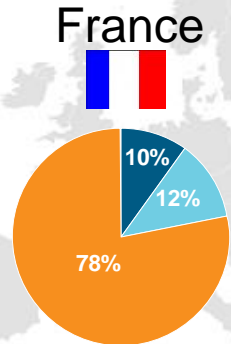
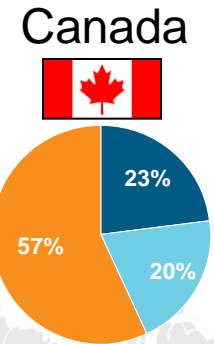
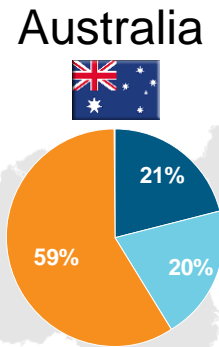
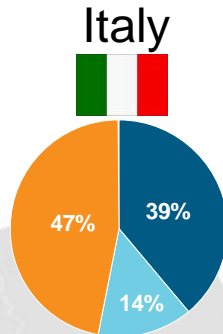
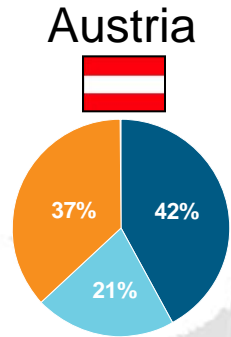
Sample Representation

- In order to compare results between countries, one data collection method, online, was used.
- Internet penetration is extremely low (ranges from 9% to 20%) at the current time in China, India, Thailand and Russia.
 - The objective of incidence measurement will not be pursued in these four countries due to low Internet penetration.
 - Basic quotas on age and gender were in place to gain a mix of respondents for these countries; however, the composition of the Internet panel is not representative of the population.
 - Across these countries the sample is younger, more likely to be employed and are more likely to be in a high income or social class.
 - The sample for these countries can be classified as a convenience sample. A **convenience sample** chooses the individuals that are easiest to reach. Convenience sampling does not represent the entire population so it is considered biased.



Spa Incidence

Past 12 Months



In the past 12 months, have you been to a spa?
Have you ever been to a spa?

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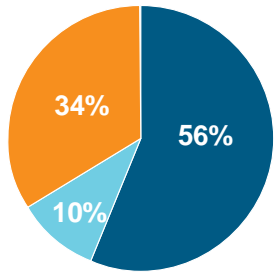


Spa Incidence

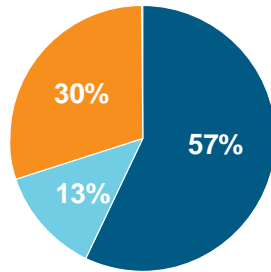
Past 12 Months

Internet Population*

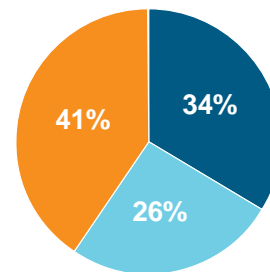
China



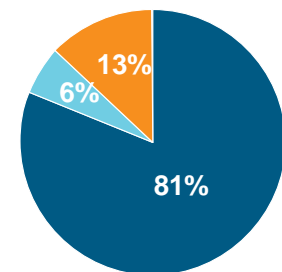
India



Russia



Thailand



- Active Spa-goers
- Inactive Spa-goers
- Non-spa-goers

* Convenience sample

In the past 12 months, have you been to a spa?
Have you ever been to a spa?

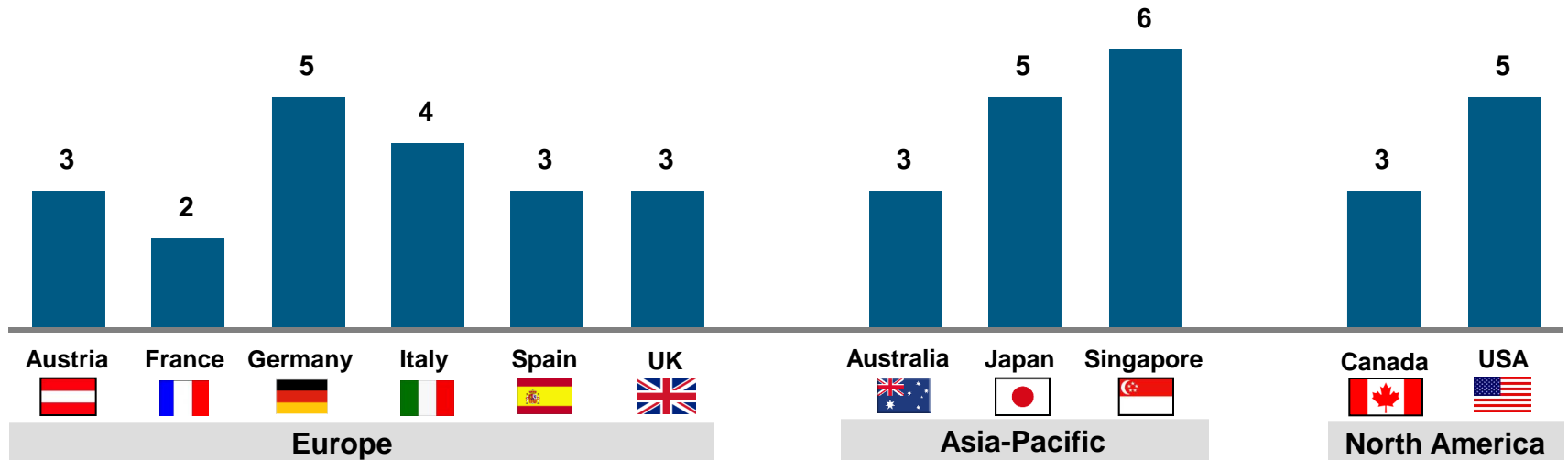
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Average Number of Visits

Past 12 Months; Active Spa-goers

- Globally, spa-goers average about four visits per 12 months.



How many times have you been to a spa in the past 12 months?

Mean data shown

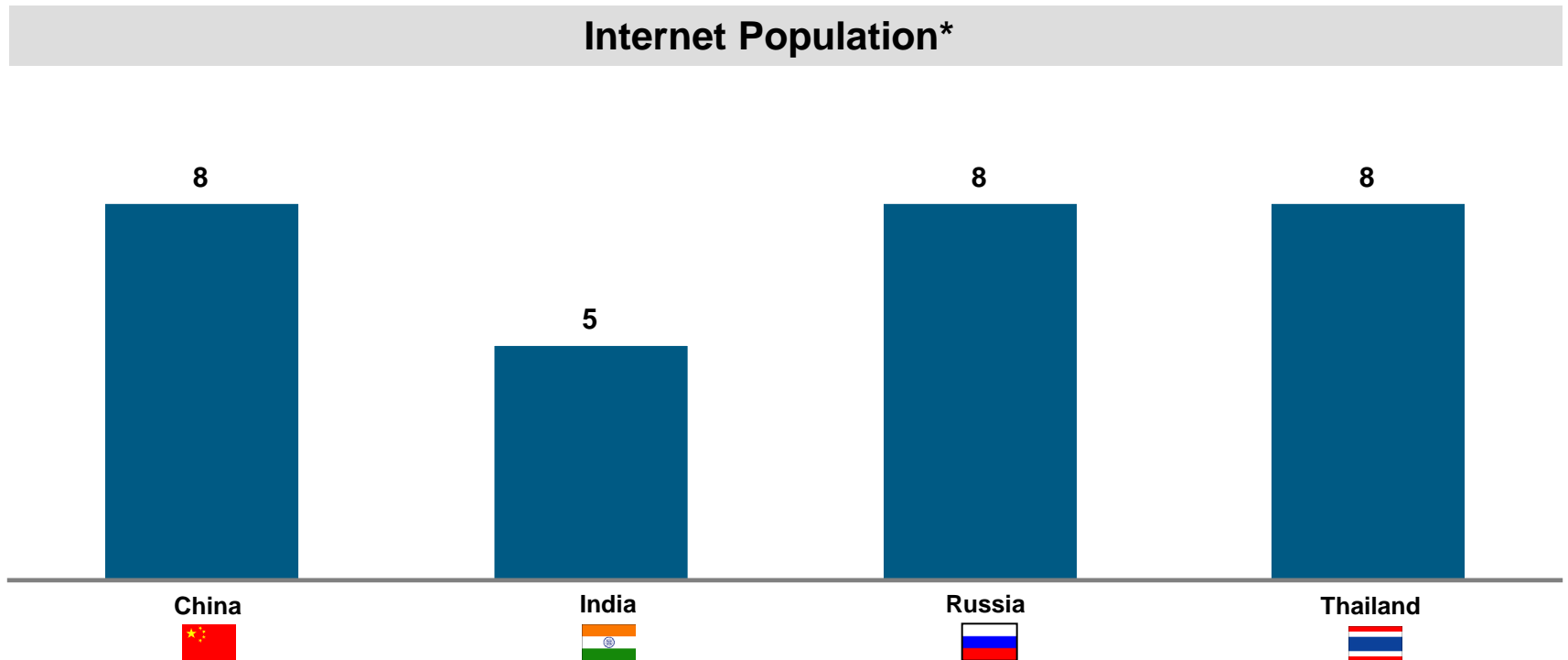
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Average Number of Visits

Past 12 Months; Active Spa-goers

- Spa-goers in these countries average more than 5 spa visits per year.



How many times have you been to a spa in the past 12 months?

Mean data shown

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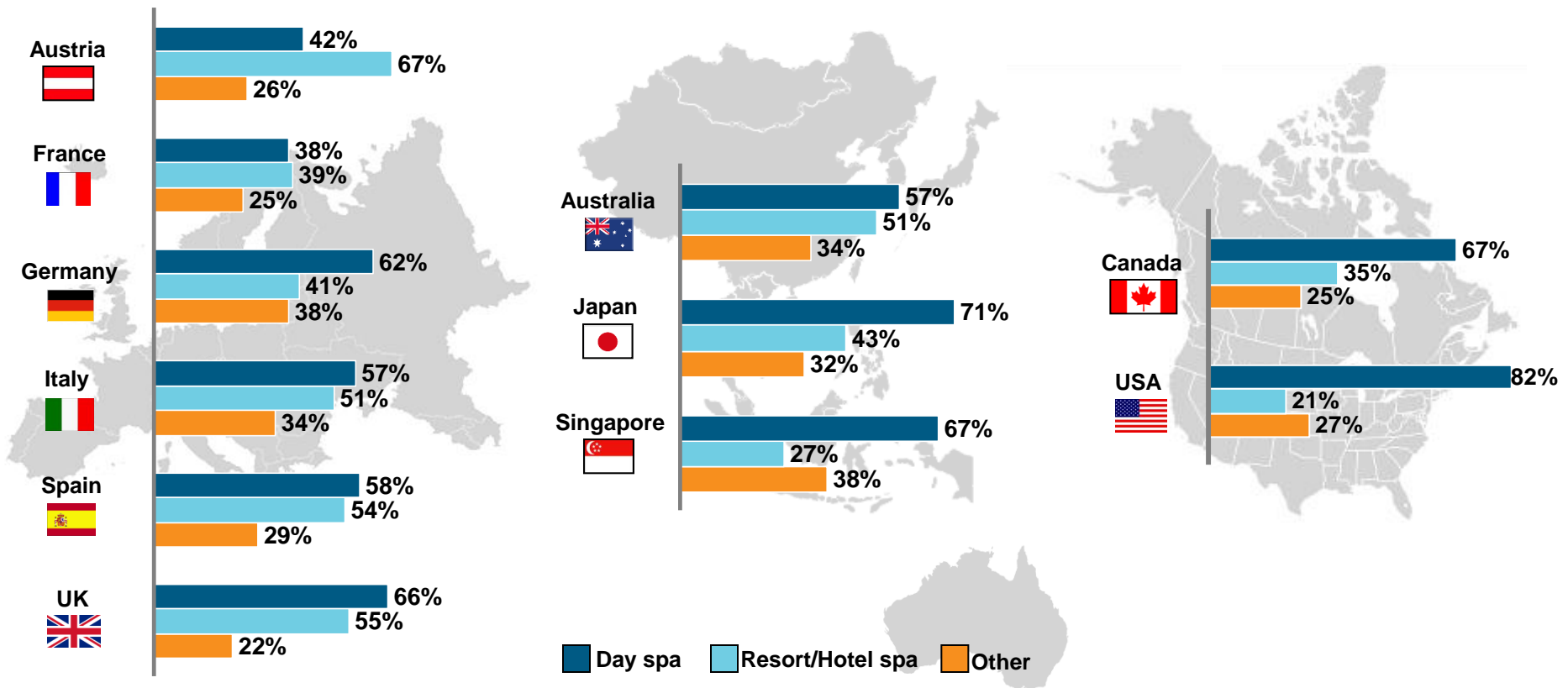
* Convenience sample



Type of Spa Visited

Past 12 Months; Active Spa-goers

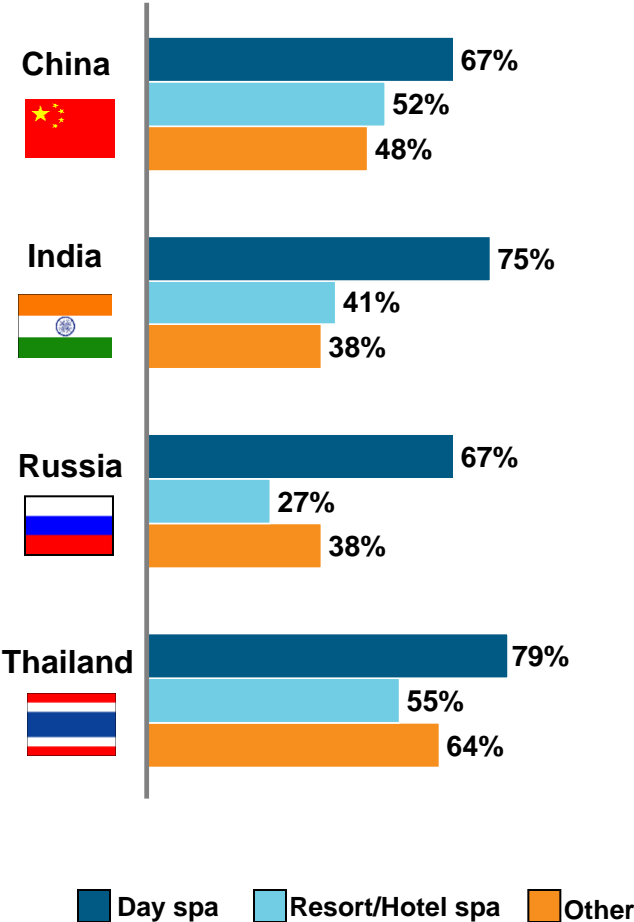
- Day spas are more popular than other types of spas in all countries except Austria and France.



Type of Spa Visited

Past 12 Months; Active Spa-goers

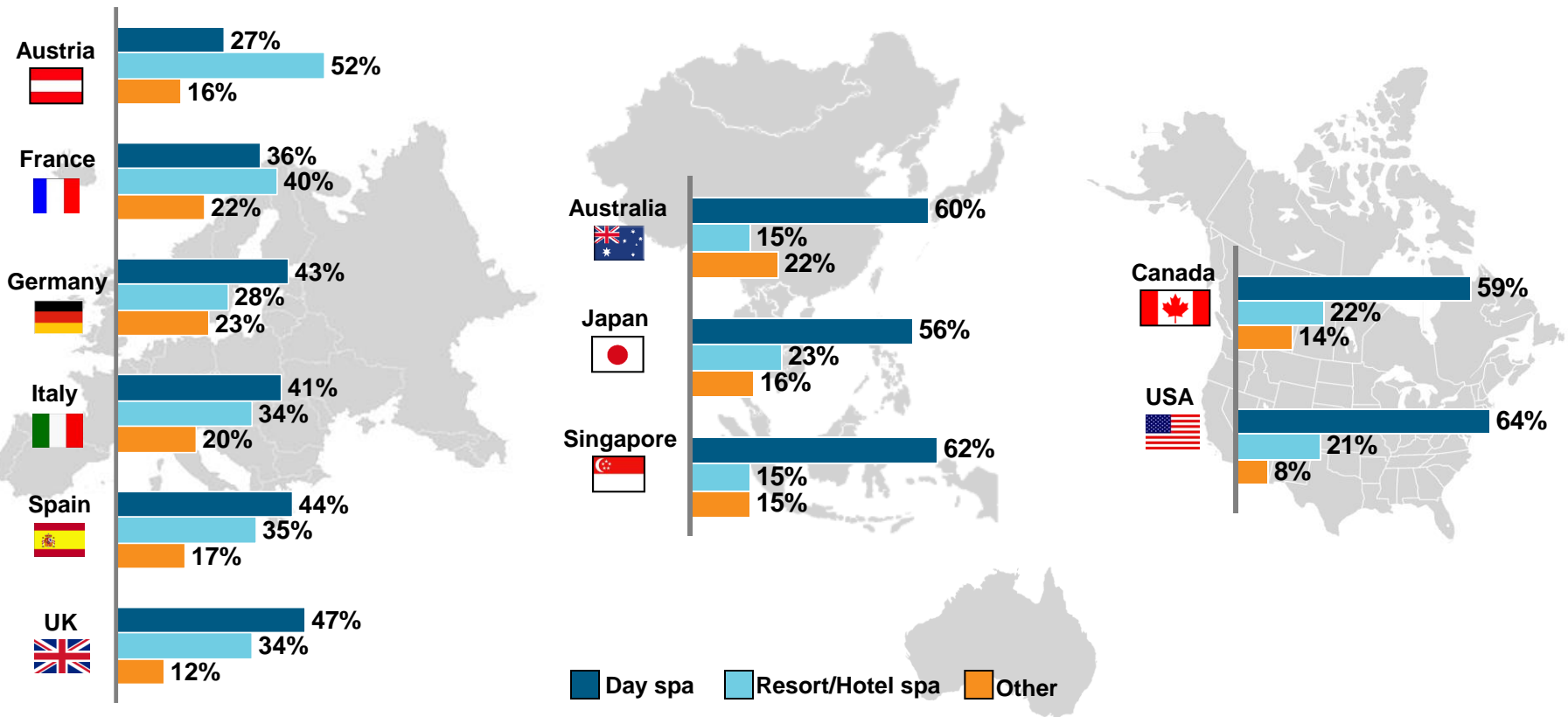
Internet Population*



Type of Spa Visited Most Often

Past 12 Months; Active Spa-goers

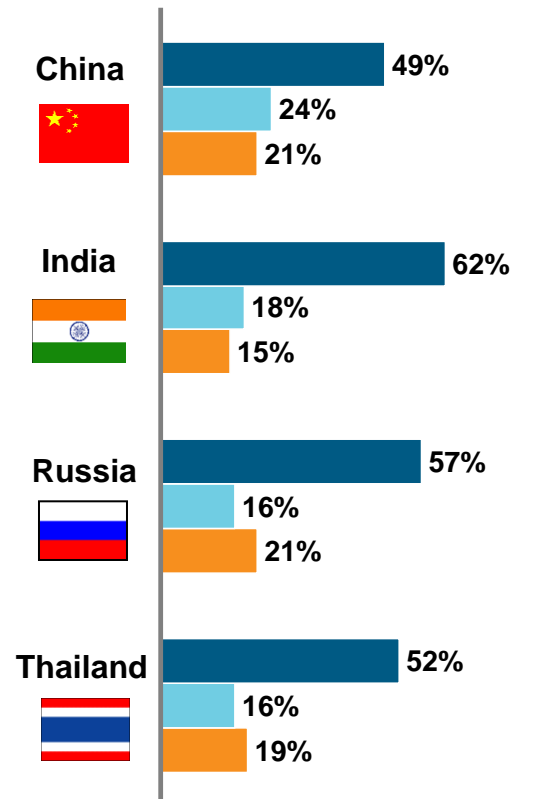
- In most countries, day spas are visited most often.
- In Austria and France, resort/hotel spas are visited most often.



Type of Spa Visited Most Often

Past 12 Months; Active Spa-goers

Internet Population*



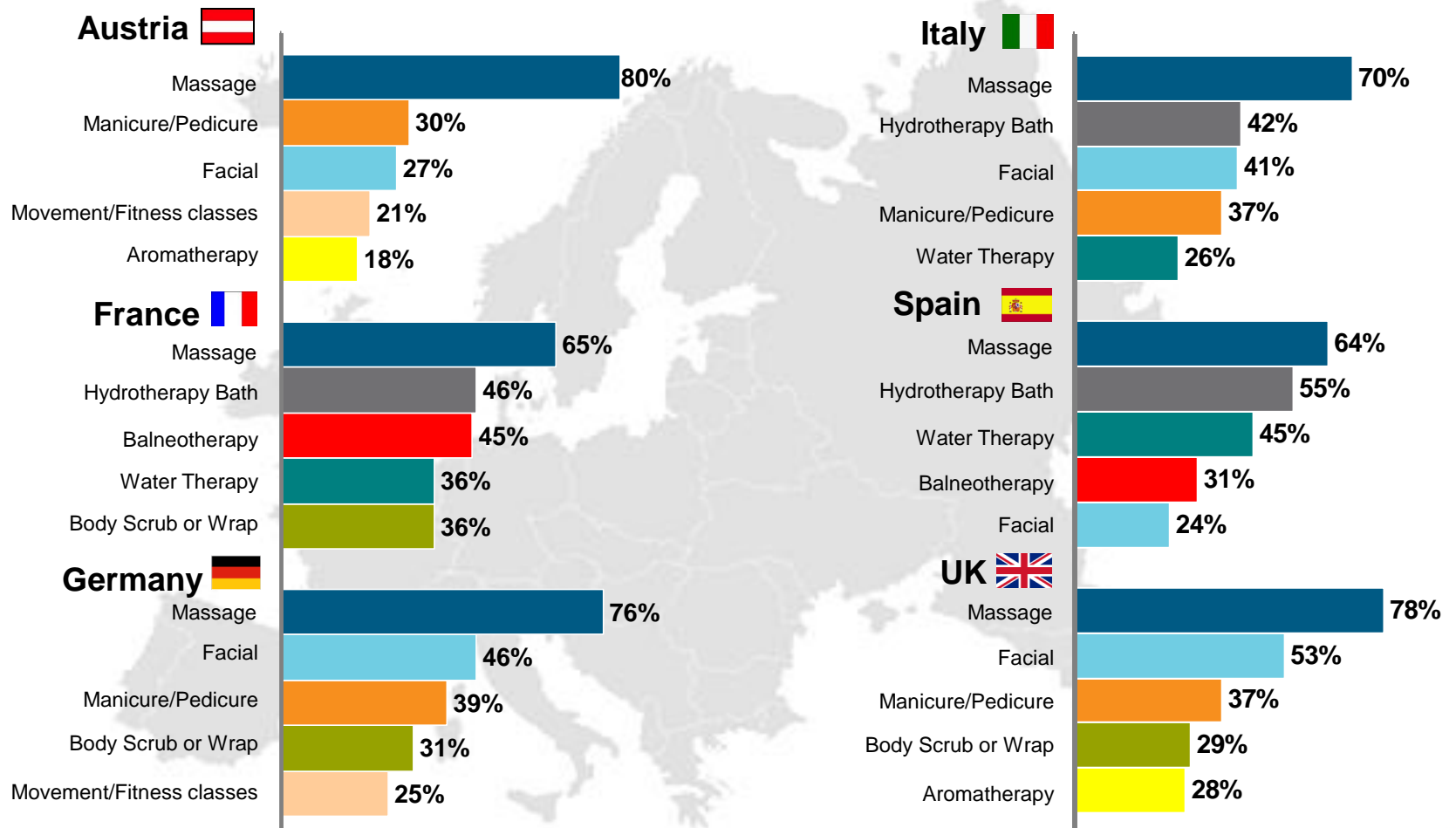
■ Day spa ■ Resort/Hotel spa ■ Other



Top 5 Treatments - Europe

Past 12 Months; Active Spa-goers

- In France, Italy and Spain, hydrotherapy bath treatments are received by more than 40% of spa-goers.



Which of the following treatments have you received at a spa in the past 12 months? (Select all that apply)

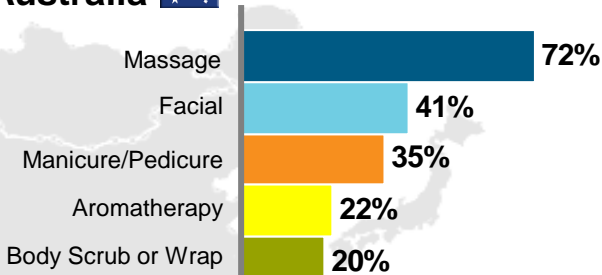
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Top 5 Treatments – Asia-Pacific & North America

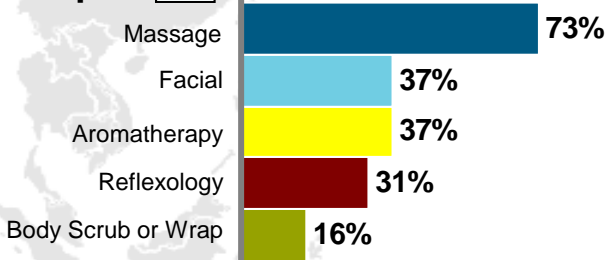
Past 12 Months; Active Spa-goers

- Massage is the top treatment received in Asia-Pacific and North American countries.

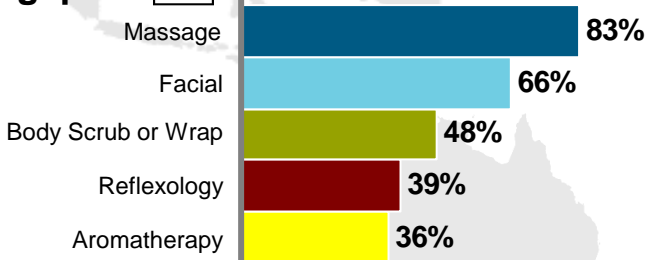
Australia



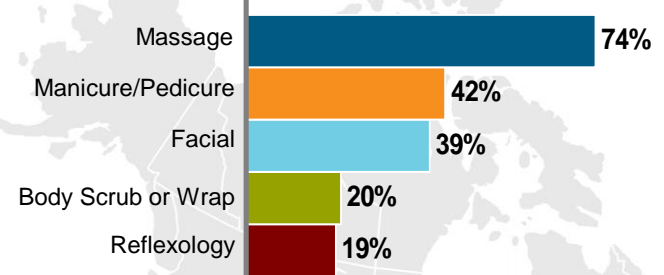
Japan



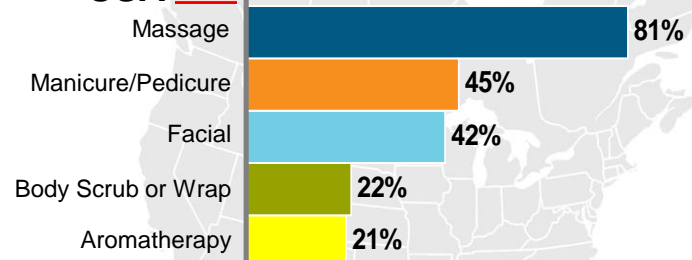
Singapore



Canada



USA

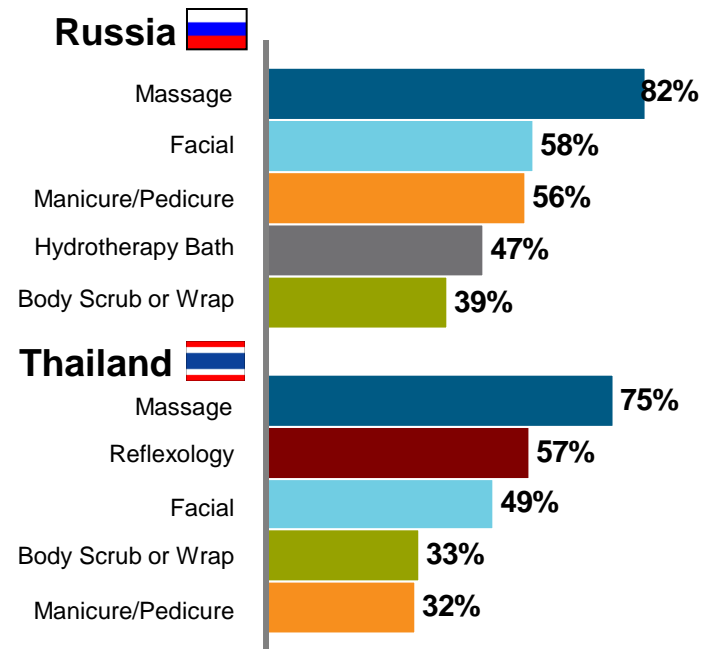
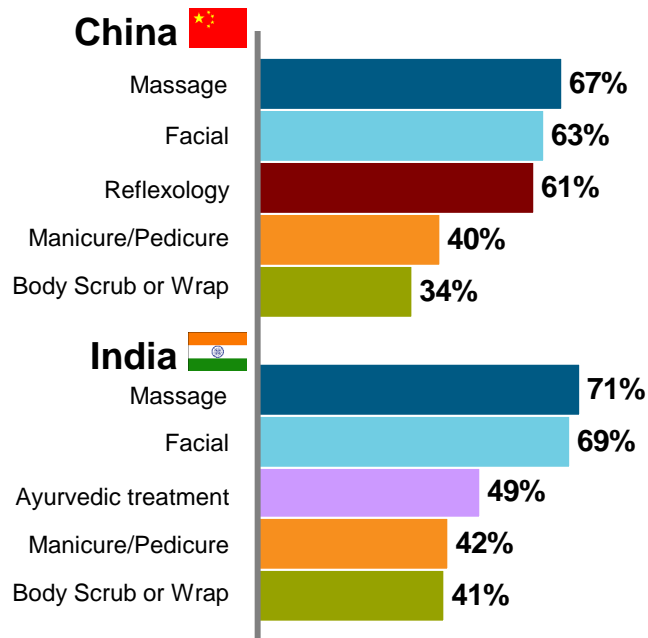


Top 5 Treatments

Past 12 Months; Active Spa-goers

- Massage and facial treatments are the most popular for these spa-goers.

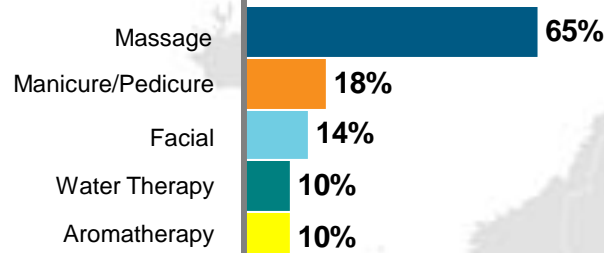
Internet Population*



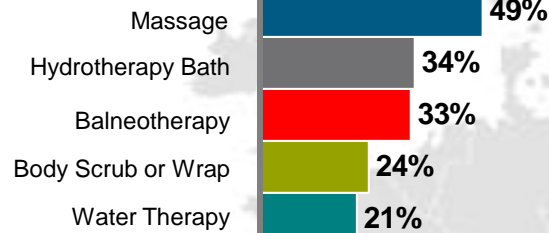
Most Recent Treatments - Europe

Most Recent Visit; Active Spa-goers

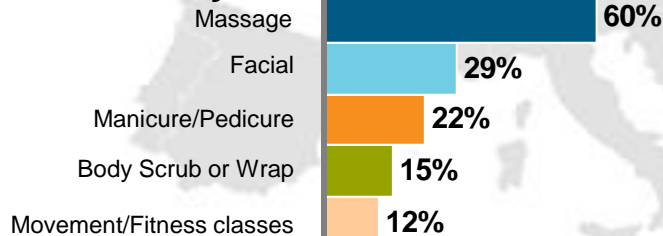
Austria



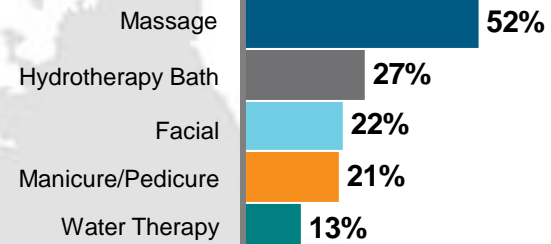
France



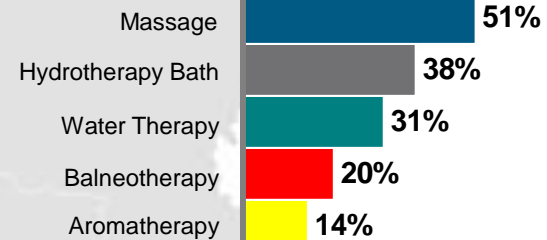
Germany



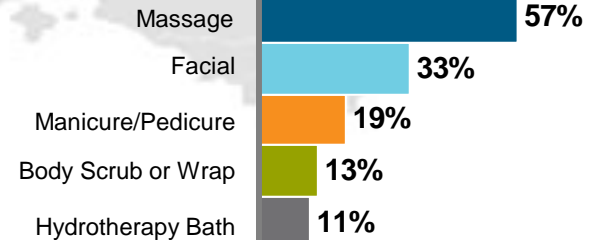
Italy



Spain



UK



Which treatments did you receive on your most recent visit? (Select all that apply)

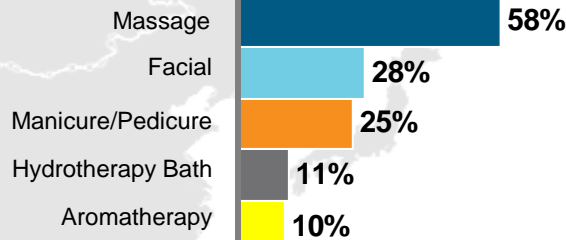
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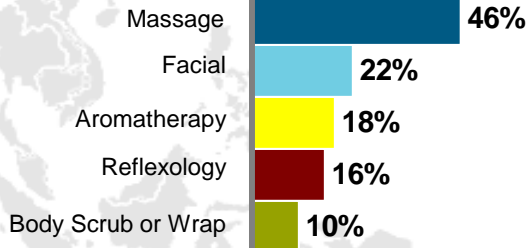
Most Recent Treatments - Asia-Pacific & North America

Most Recent Visit; Active Spa-goers

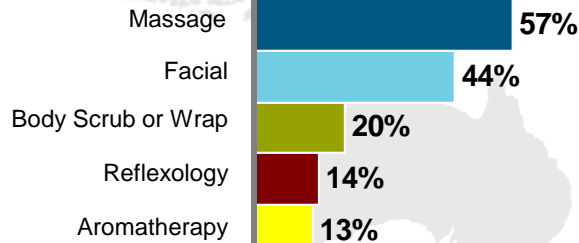
Australia



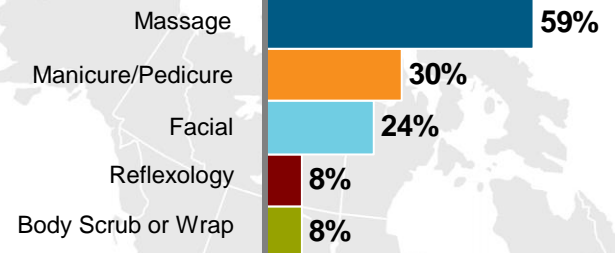
Japan



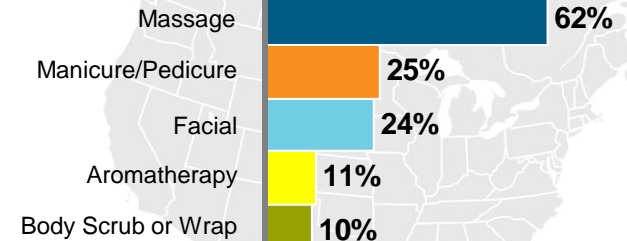
Singapore



Canada



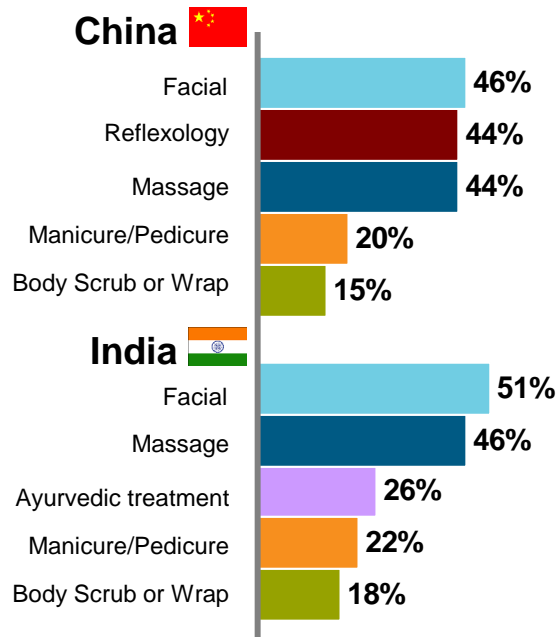
USA



Most Recent Treatments

Most Recent Visit; Active Spa-goers

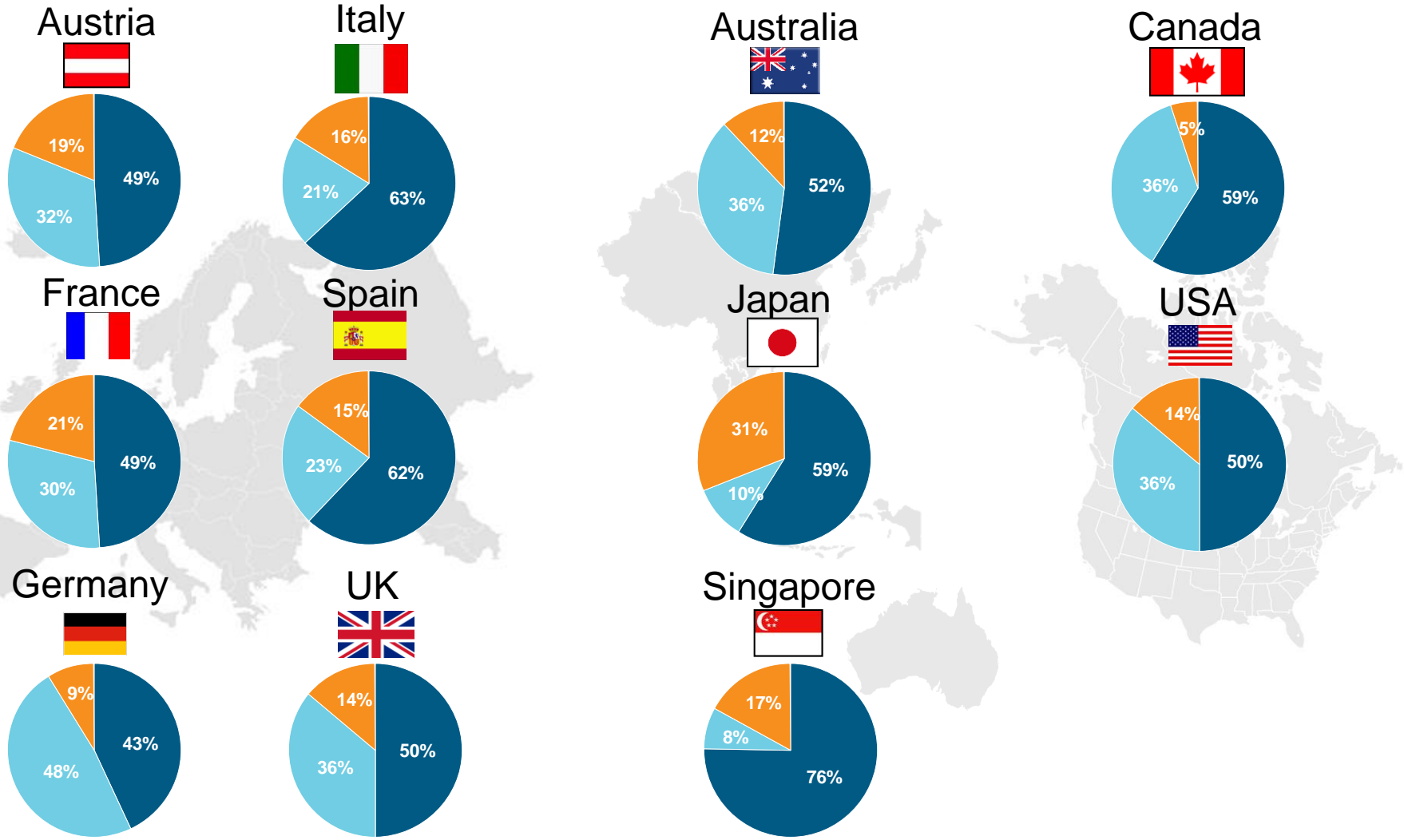
Internet Population*



Purchase, Gift or Complimentary

Most Recent Treatments; Active Spa-goers

■ In Canada and the United States, 36% of spa-goers' last treatment was a gift.



On your most recent visit, did you purchase these treatments or was it a gift or complimentary service from the spa?



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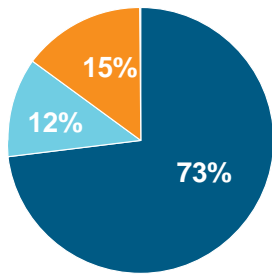


Purchase, Gift or Complimentary

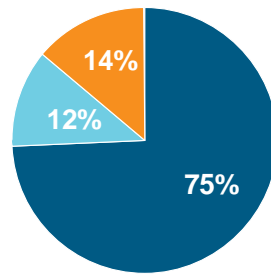
Most Recent Treatments; Active Spa-goers

Internet Population*

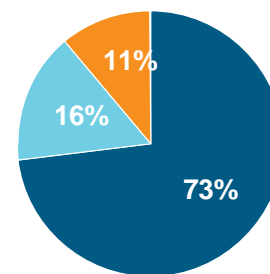
China



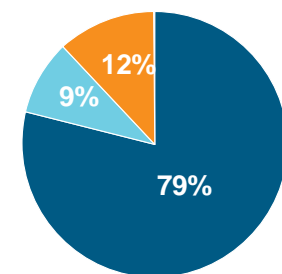
India



Russia



Thailand



On your most recent visit, did you purchase these treatments or was it a gift or complimentary service from the spa?
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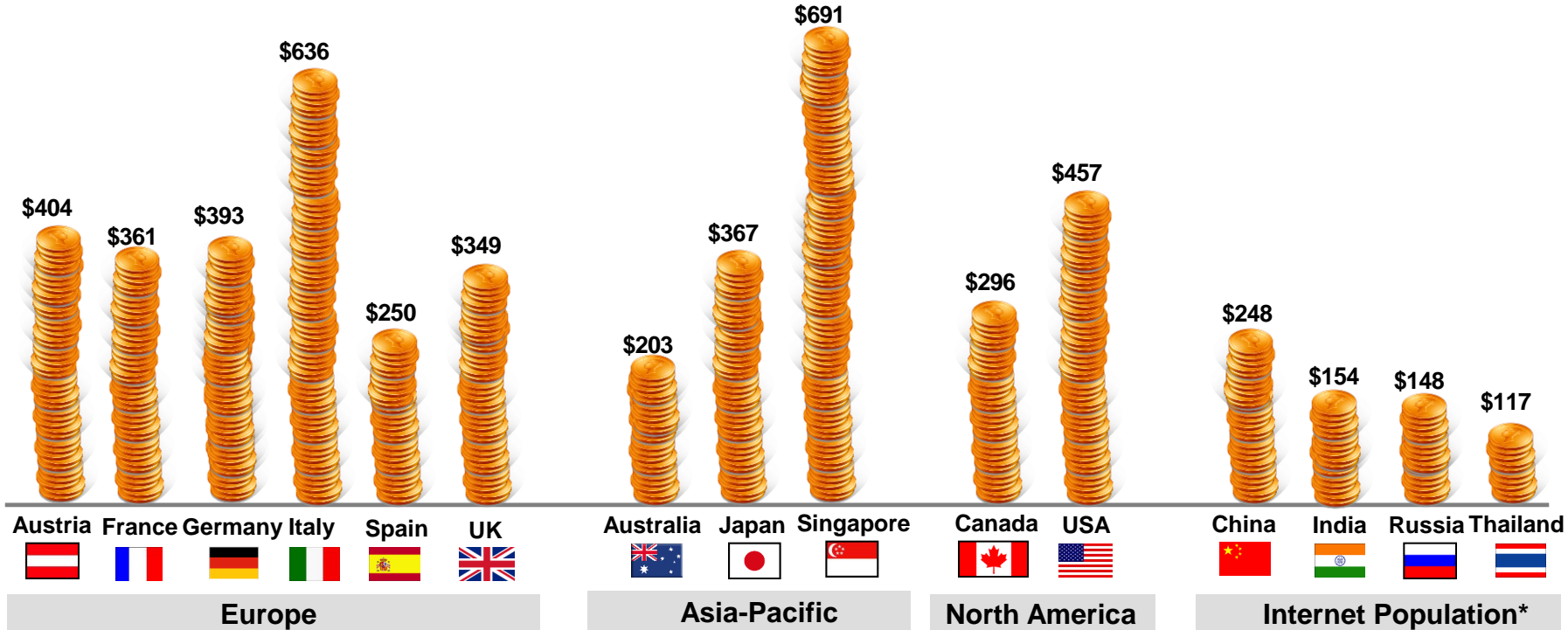
* Convenience sample



Amount Spent on Treatments

Past 12 Months; Active Spa-goers

- The average spa-goer in Italy and Singapore spent more than \$600 on spa treatments within the past 12 months.

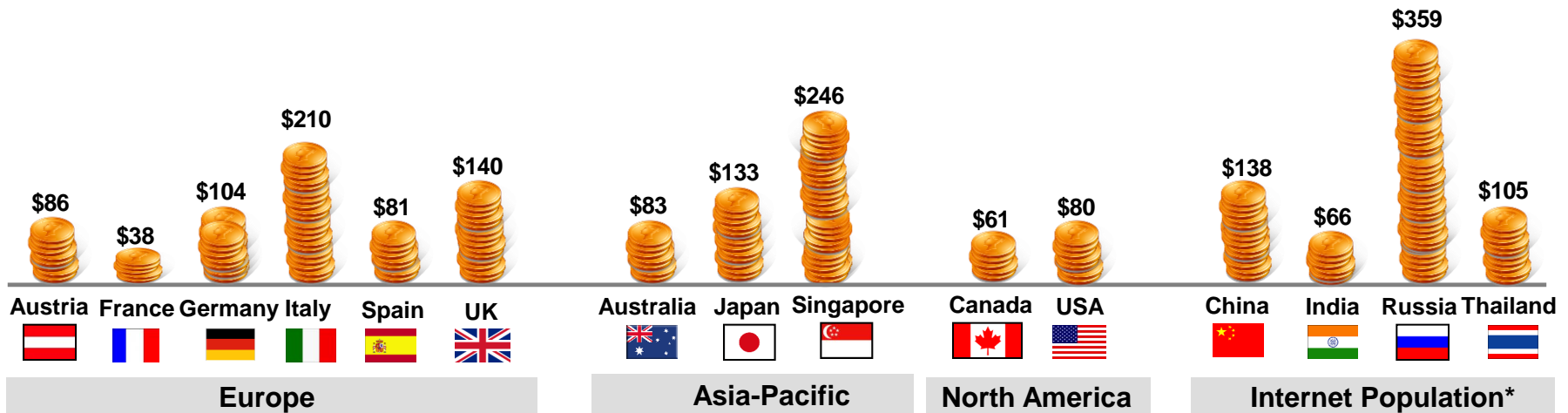


How much did you spend in total on spa treatments in the past 12 months?
Amounts stated in U.S. dollars

Amount Spent on Retail Products

Past 12 Months; Active Spa-goers

- The amount spent on spa retail products ranges from \$38 in France to more than \$200 in Italy, Russia and Singapore.



How much did you spend at spas on spa retail products (e.g., skin care products, etc.) in the past 12 months?
Amounts stated in U.S. dollars



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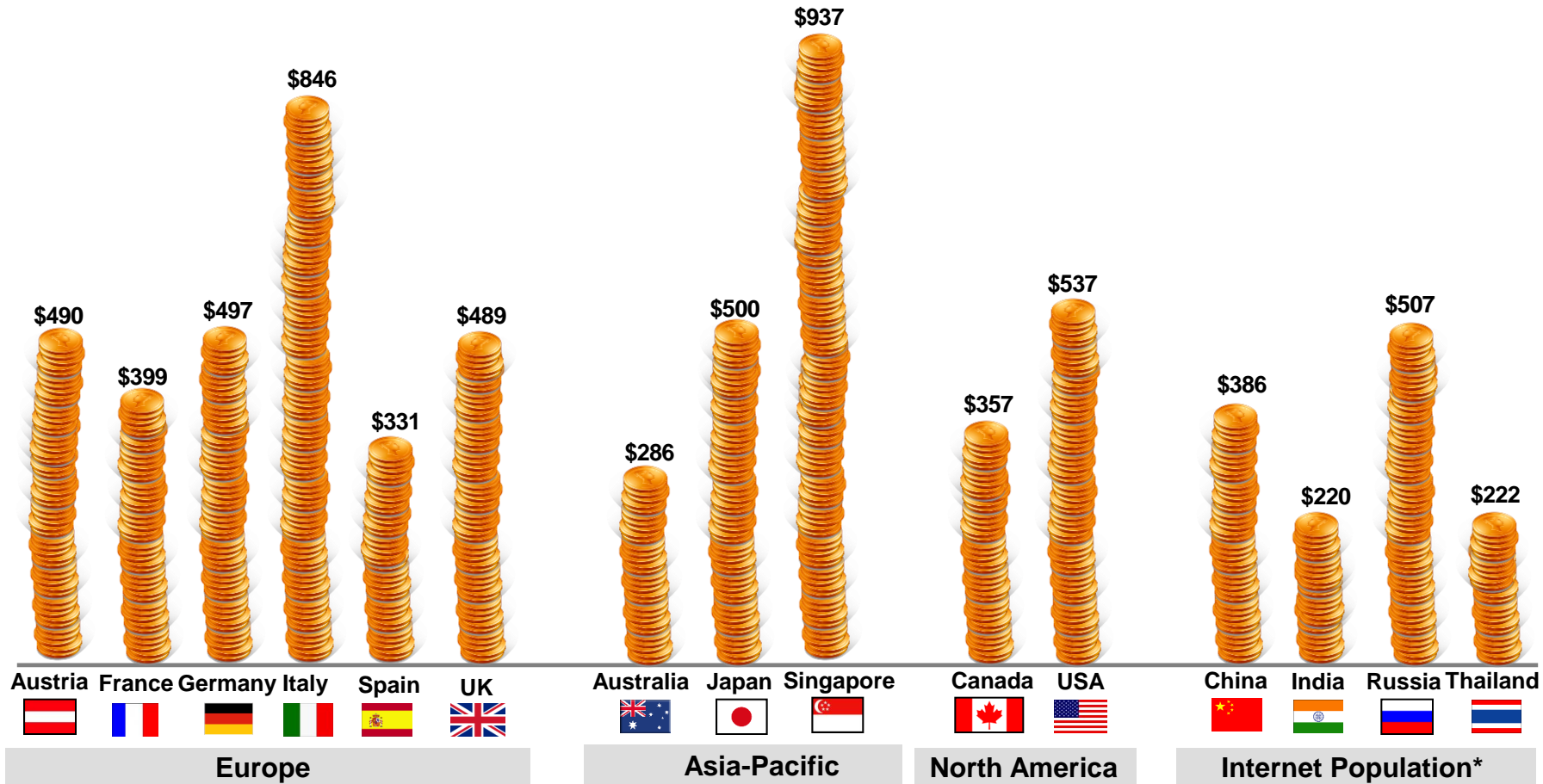
* Convenience sample



Total Amount Spent

Past 12 Months; Active Spa-goers

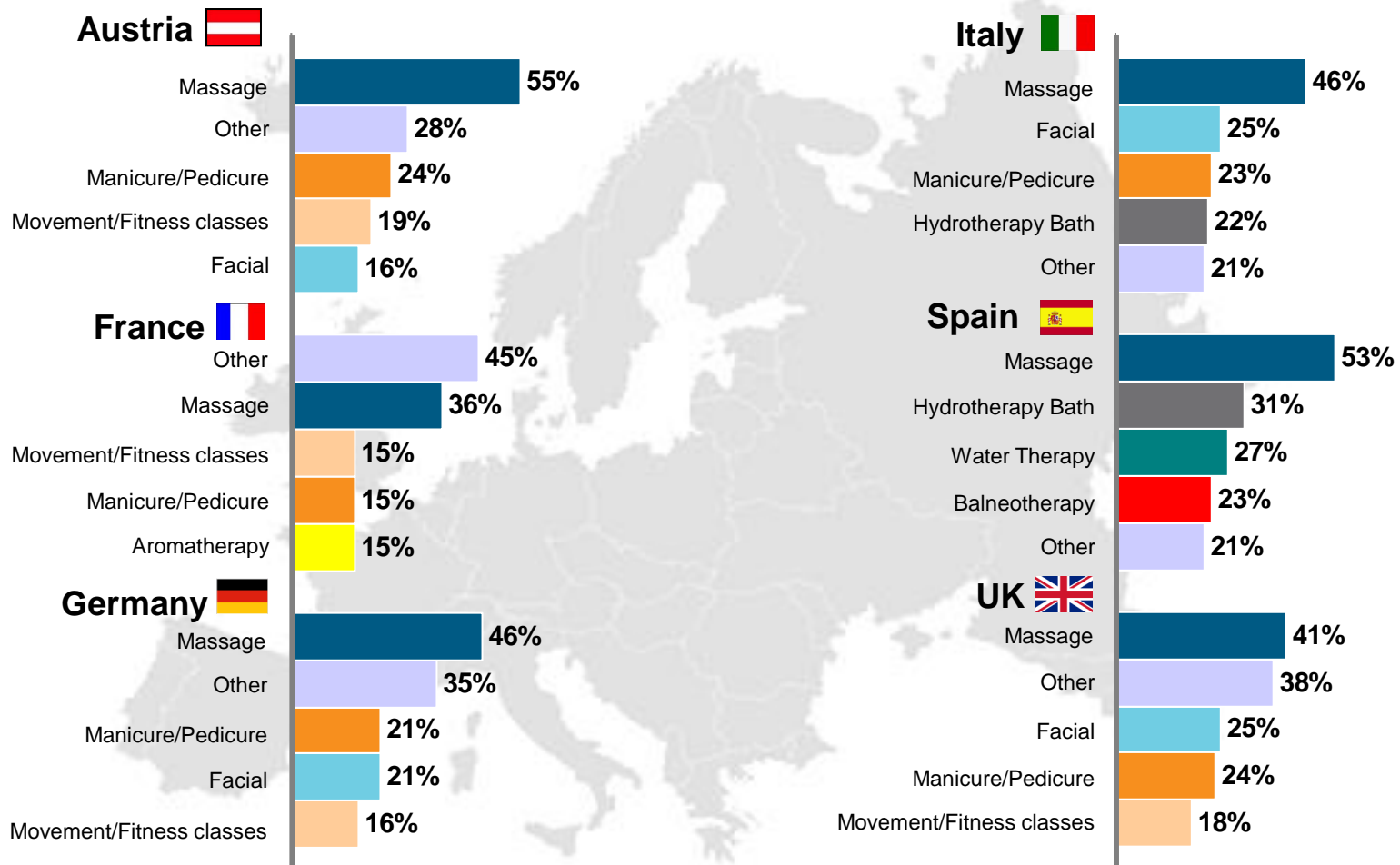
- Active spa-goers in Singapore spent the most within the past 12 months on spa treatments and retail products.



Treatment Likely to Use/Try - Europe

Total Sample

- A massage is the treatment most likely to be tried by respondents in Europe.



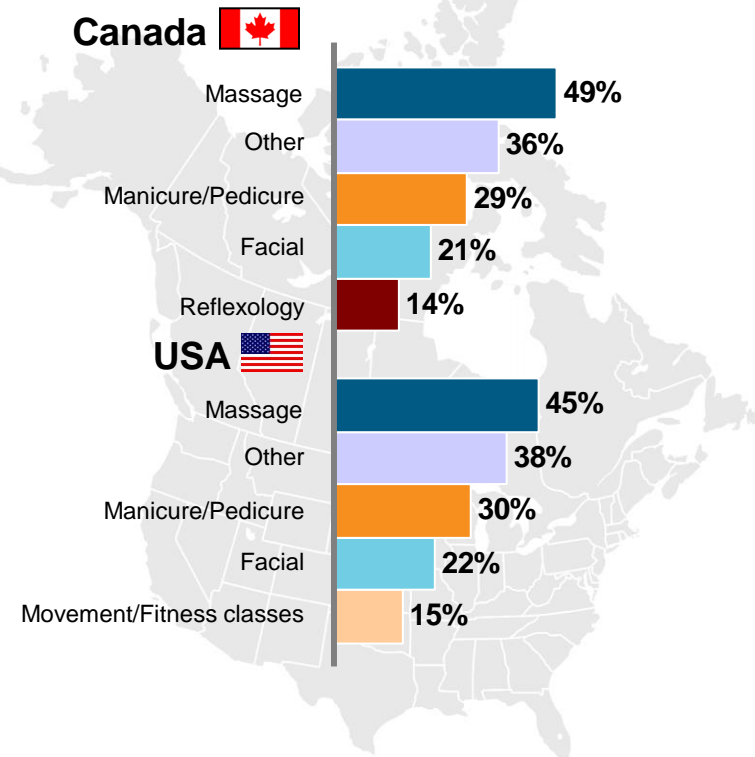
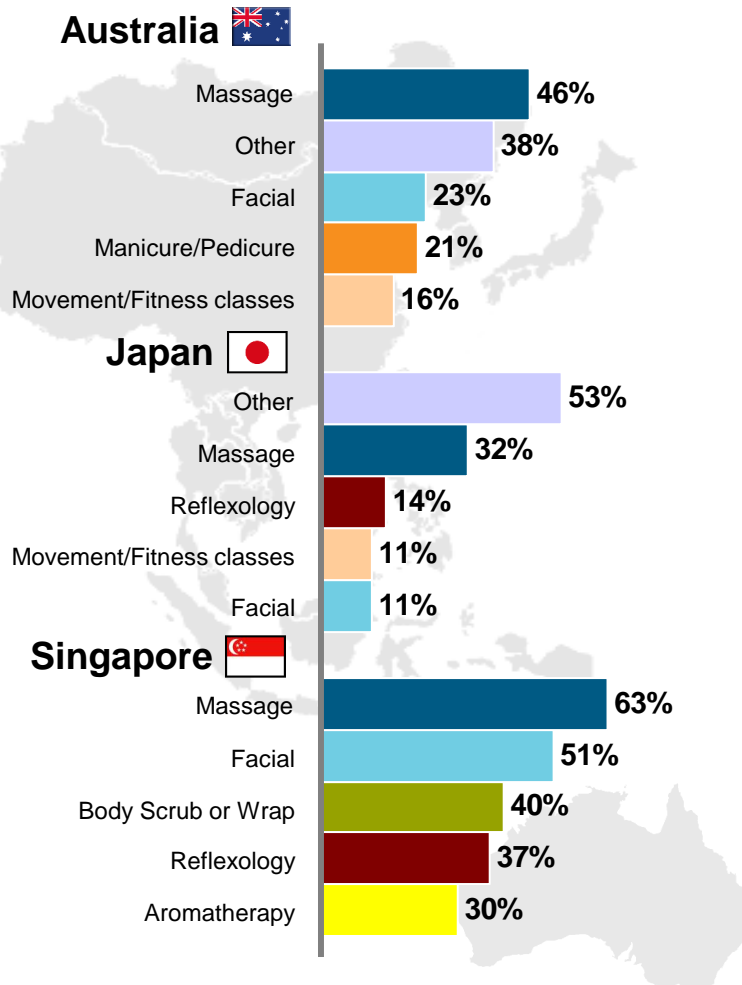
Which of the following spa treatments are you likely to use/try within the next 12 months?
Top five selections shown



Treatment Likely to Use/Try – Asia-Pacific & North America

Total Sample

- A massage is the treatment most likely to be tried in Asia-Pacific and North America.



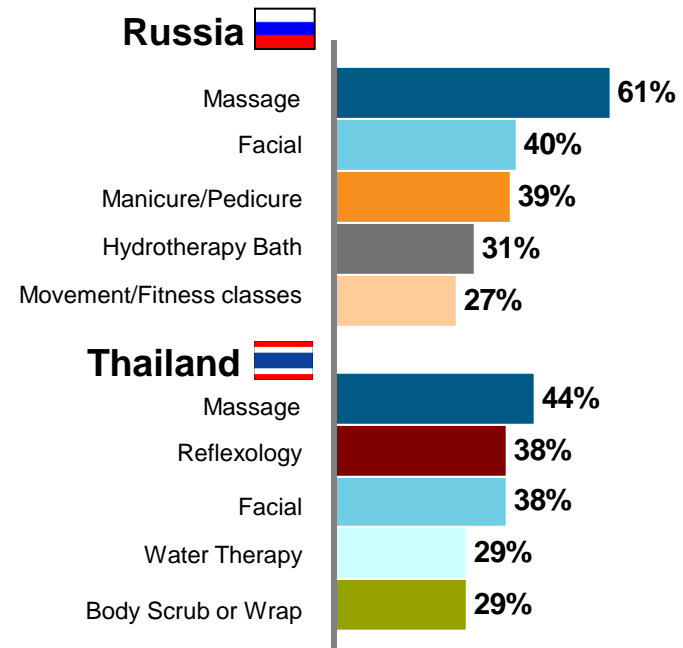
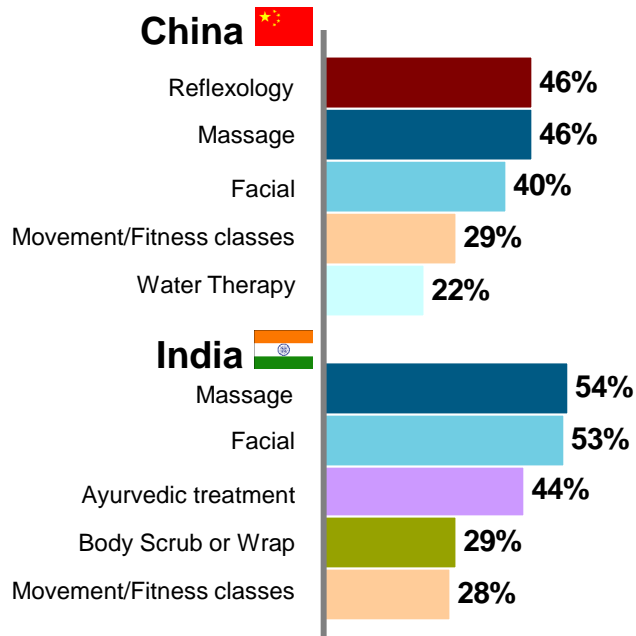
Which of the following spa treatments are you likely to use/try within the next 12 months?
Top five selections shown



Treatment Likely to Use/Try

Total Sample

Internet Population*



Which of the following spa treatments are you likely to use/try within the next 12 months?
Top five selections shown

* Convenience sample


















Visit Motivators

Total Sample

- In all countries, the top spa visit motivators are recommendations from family, friends or health care practitioners, or price incentives.

Top Motivators for Visiting a Spa

		Europe						Asia-Pacific			N. America		Internet Population*			
	Avg	Austria	France	Germany	Italy	Spain	UK	Australia	Japan	Singapore	Canada	USA	China	India	Russia	Thailand
																
Friends and/or Family recommendations	46%	48%	36%	46%	46%	53%	41%	37%	32%	63%	41%	45%	46%	54%	61%	44%
Gift Certificate	37%	47%	-	21%	25%	20%	25%	60%	11%	51%	61%	22%	40%	53%	40%	38%
Health care practitioner recommendation	25%	37%	15%	21%	23%	15%	24%	31%	-	25%	29%	30%	22%	28%	39%	17%
Complimentary products or bonus services	31%	22%	45%	35%	21%	21%	38%	27%	53%	-	24%	38%	-	-	16%	-
Packages	20%	26%	15%	16%	16%	16%	18%	17%	11%	19%	21%	15%	29%	28%	27%	26%
Advertised Sale	21%	26%	13%	-	16%	16%	15%	16%	14%	37%	18%	12%	46%	17%	14%	38%
Appt. times that meet your schedule and needs	17%	17%	15%	11%	13%	17%	14%	11%	11%	30%	11%	11%	19%	23%	20%	26%
Membership option that offers better pricing or additional benefits	20%	-	14%	12%	-	10%	13%	-	-	40%	-	10%	18%	29%	23%	29%

"-" Less than 10%

Which three, if any, of the following would most motivate you to visit a particular spa?

* Convenience sample


















Enjoyment of Treatment - Essential Factors

Total Sample

- A stress-free environment, expertise of the staff and the spa atmosphere are the three most essential factors leading to the enjoyment of a spa experience.

Essential to Your Enjoyment of Experience

	Avg.	Europe						Asia-Pacific			N. America		Internet Population*			
		Austria 	France 	Germany 	Italy 	Spain 	UK 	Australia 	Japan 	Singapore 	Canada 	USA 	China 	India 	Russia 	Thailand 
Stress-free environment	33%	41%	25%	37%	37%	32%	35%	36%	28%	41%	33%	31%	30%	34%	31%	28%
Expertise/credentials of staff	25%	12%	15%	17%	26%	18%	25%	25%	21%	33%	28%	21%	41%	27%	26%	37%
Atmosphere in a spa	26%	40%	17%	33%	15%	18%	23%	24%	32%	36%	26%	26%	12%	28%	22%	42%
Location	26%	26%	12%	28%	20%	23%	36%	37%	23%	34%	31%	37%	11%	25%	26%	17%
Availability of convenient treatment times & punctuality	19%	21%	17%	24%	28%	34%	10%	12%	24%	17%	13%	13%	14%	17%	35%	10%
Availability of steam room/sauna/pools	17%	30%	14%	18%	21%	24%	17%	11%	13%	13%	12%	11%	15%	11%	23%	21%
Ability to customize treatments	18%	16%	21%	19%	20%	25%	12%	14%	-	25%	15%	16%	17%	17%	15%	20%
Availability of treatments designed for men	15%	12%	13%	12%	17%	10%	18%	16%	11%	17%	18%	16%	23%	15%	16%	11%
Wide range of available spa treatments	16%	14%	23%	17%	14%	25%	16%	13%	-	16%	15%	16%	-	14%	20%	14%
Convenient parking/transportation	17%	14%	10%	-	20%	14%	15%	14%	31%	14%	10%	-	-	-	-	25%
Learning ways to take better care of myself	15%	-	16%	12%	14%	14%	12%	14%	-	-	-	11%	20%	20%	20%	11%

"-" Less than 10%

Which three, if any, of the following are most essential to your enjoyment of a spa experience?



RESEARCH INTERNATIONAL

* Convenience sample



Primary Reasons for Going to a Spa

Spa-goers

- Primary reasons for going to a spa are to relax and relieve/reduce stress or for overall health.

Primary Reasons for Going to a Spa

	Avg	Europe						Asia-Pacific			N. America		Internet Population*			
		Austria	France	Germany	Italy	Spain	UK	Australia	Japan	Singapore	Canada	USA	China	India	Russia	Thailand
Relax and relieve/ reduce stress	60%	63%	58%	53%	59%	67%	64%	60%	71%	70%	60%	62%	50%	55%	49%	61%
Overall wellness/health	37%	53%	56%	42%	45%	47%	24%	24%	13%	30%	30%	21%	44%	43%	50%	29%
Pampered	29%	46%	18%	43%	22%	26%	42%	39%	-	43%	33%	38%	-	14%	20%	15%
Soothe sore joints/ muscles	24%	15%	38%	18%	25%	30%	24%	30%	18%	25%	26%	29%	21%	12%	17%	39%
Self-indulgent	23%	37%	34%	34%	-	-	15%	16%	34%	13%	22%	19%	12%	10%	29%	30%
Therapeutic for my body	19%	20%	13%	20%	19%	24%	15%	15%	32%	15%	19%	18%	19%	19%	27%	16%
Make me look better	21%	-	-	10%	25%	14%	18%	11%	10%	24%	18%	18%	31%	35%	34%	30%
Therapeutic for my mind	17%	-	-	-	20%	14%	12%	11%	25%	-	14%	20%	-	18%	-	-
Look younger	22%	-	-	-	10%	-	-	-	18%	13%	-	-	32%	29%	28%	-

"-" Less than 10%

Which of the following are the primary reasons you go to the spa? (Select up to three)



RESEARCH INTERNATIONAL

* Convenience sample


















Top 10 Reasons for Not Visiting a Spa

Total Sample

- The perception that spas are expensive and lack of time are the top reasons for not visiting a spa.

Top 10 Reasons for Not Visiting a Spa

		Europe						Asia-Pacific			N. America		Internet Population*			
	Avg	Austria	France	Germany	Italy	Spain	UK	Australia	Japan	Singapore	Canada	USA	China	India	Russia	Thailand
																
Spas are very expensive	56%	67%	69%	49%	53%	59%	63%	55%	49%	58%	62%	66%	40%	46%	45%	62%
I don't have enough time to go to a spa	29%	31%	22%	27%	29%	34%	23%	25%	30%	35%	22%	23%	25%	34%	42%	34%
Spas not in a convenient location for me	21%	-	15%	27%	24%	20%	27%	24%	11%	25%	18%	20%	18%	26%	19%	33%
A hard sales approach during visit makes me uncomfortable	19%	19%	-	20%	11%	-	11%	11%	11%	54%	13%	12%	29%	14%	28%	41%
I don't know exactly what to expect in a spa	15%	14%	15%	19%	16%	15%	19%	19%	14%	11%	19%	19%	-	14%	17%	-
Uncomfortable with a male spa employee massaging/treating me	13%	-	-	-	10%	-	11%	15%	-	23%	15%	17%	20%	18%	10%	23%
I don't know what services spas offer	12%	10%	19%	13%	10%	12%	11%	15%	16%	-	12%	11%	10%	12%	12%	13%
Embarrassed others see me without clothing at spa	10%	-	-	10%	-	-	15%	14%	-	12%	12%	12%	13%	-	-	14%
I would feel out of place in a spa	10%	-	-	-	-	-	18%	18%	-	-	16%	19%	12%	-	-	-
Spas are not flexible in getting an appointment when I want	10%	-	-	-	-	13%	-	-	-	18%	-	-	15%	16%	20%	15%

"-" Less than 10%

Which of the following has kept you from visiting a spa or has decreased the frequency of your visits?
















* Convenience sample



Reasons for Not Visiting a Spa

Active Spa-goers

Reasons for Not Visiting a Spa

		Europe						Asia-Pacific			N. America		Internet Population*			
	Avg	Austria	France	Germany	Italy	Spain	UK	Australia	Japan	Singapore	Canada	USA	China	India	Russia	Thailand
																
Spas are very expensive	55%	73%	84%	54%	49%	58%	60%	53%	46%	53%	59%	59%	36%	43%	39%	63%
I don't have enough time to go to a spa	31%	31%	20%	26%	25%	31%	29%	30%	33%	35%	24%	31%	28%	36%	48%	34%
A hard sales approach during visit makes me uncomfortable	22%	22%	-	20%	15%	-	16%	13%	19%	58%	20%	15%	34%	18%	31%	42%
Spas are not in a convenient location for me	19%	-	11%	21%	18%	20%	19%	18%	12%	27%	17%	16%	22%	28%	24%	35%
Spas are not flexible in getting an appointment when I want	13%	11%	-	12%	-	14%	-	-	10%	21%	10%	-	19%	20%	29%	15%
Uncomfortable with a male spa employee massaging/treating me	13%	-	10%	12%	-	-	11%	13%	-	23%	12%	13%	22%	20%	-	23%

"-" Less than 10%

Which of the following has kept you from visiting a spa or has decreased the frequency of your visits?

* Convenience sample



Reasons for Not Visiting a Spa

Inactive Spa-goers

Reasons for Not Visiting a Spa

	Avg	Europe						Asia-Pacific			N. America		Internet Population*			
		Austria	France	Germany	Italy	Spain	UK	Australia	Japan	Singapore	Canada	USA	China	India	Russia	Thailand
Spas are very expensive	64%	74%	74%	60%	57%	69%	69%	66%	61%	70%	76%	74%	39%	52%	44%	76%
Other	34%	35%	22%	35%	39%	34%	31%	28%	42%	43%	28%	31%	26%	36%	43%	42%
I don't know what services spas offer	25%	-	32%	40%	28%	27%	28%	29%	17%	26%	19%	23%	17%	29%	20%	34%
Spas are just not for people like me	22%	21%	21%	23%	-	-	19%	19%	19%	57%	15%	17%	26%	14%	37%	32%
Going to spas is too self indulgent	13%	12%	-	-	12%	-	10%	19%	-	23%	12%	16%	15%	15%	14%	31%
Embarrassed others see me without clothing at spa	11%	11%	-	12%	-	20%	-	-	-	14%	-	-	11%	13%	23%	13%
A hard sales approach during visit makes me uncomfortable	10%	-	-	-	-	-	15%	15%	-	15%	-	-	19%	-	-	24%

"-" Less than 10%

Which of the following has kept you from visiting a spa or has decreased the frequency of your visits?

* Convenience sample



Reasons for Not Visiting a Spa

Non-spa-goers

Reasons for Not Visiting a Spa

	Avg	Europe						Asia-Pacific			N. America		Internet Population*			
		Austria	France	Germany	Italy	Spain	UK	Australia	Japan	Singapore	Canada	USA	China	India	Russia	Thailand
Spas are very expensive	55%	55%	67%	43%	54%	56%	62%	52%	48%	67%	59%	65%	48%	49%	51%	56%
I don't have enough time to go to a spa	26%	29%	22%	24%	28%	35%	18%	22%	27%	29%	19%	18%	19%	27%	35%	31%
I don't know exactly what to expect in a spa	24%	28%	18%	31%	26%	26%	28%	26%	18%	29%	28%	29%	14%	26%	26%	12%
I don't know what services spas offer	19%	19%	23%	23%	16%	20%	16%	22%	22%	14%	17%	14%	17%	22%	21%	12%
Spas are not in a convenient location for me	18%	-	12%	25%	28%	17%	29%	25%	10%	17%	19%	21%	10%	20%	14%	21%
I would feel out of place in a spa	15%	14%	-	13%	13%	-	27%	25%	-	17%	23%	29%	14%	10%	12%	14%
Spas are just not for people like me	15%	11%	-	12%	11%	-	21%	18%	19%	14%	20%	22%	22%	19%	13%	12%
A hard sales approach during visit makes me uncomfortable	14%	14%	-	20%	-	-	-	-	-	36%	-	-	21%	-	21%	35%
Embarrassed others see me without clothing at spa	13%	12%	-	10%	10%	-	19%	16%	-	28%	16%	16%	11%	11%	-	18%
Uncomfortable with a male spa employee massaging/treating me	13%	10%	-	-	10%	-	11%	15%	-	25%	17%	19%	18%	13%	-	21%
Uncomfortable other people touch my body	10%	-	-	-	-	-	12%	14%	13%	23%	15%	15%	10%	14%	-	-
















"-" Less than 10%

Which of the following has kept you from visiting a spa or has decreased the frequency of your visits?

* Convenience sample


















Demographics

	Europe						Asia-Pacific			N. America		Internet Population*			
	Austria	France	Germany	Italy	Spain	UK	Australia	Japan	Singapore	Canada	US	China	India	Russia	Thailand
															
Children															
No Children	59%	54%	59%	66%	59%	63%	61%	44%	45%	66%	63%	29%	39%	34%	43%
Children under the age of 12	25%	23%	22%	21%	22%	23%	26%	16%	36%	19%	24%	23%	39%	30%	35%
Children 12 or older	20%	28%	25%	17%	24%	20%	19%	43%	27%	20%	19%	51%	28%	42%	28%
Employment															
Full-time	61%	46%	51%	56%	61%	39%	28%	45%	77%	43%	44%	67%	68%	74%	71%
Part-time	11%	7%	11%	10%	8%	13%	16%	11%	5%	12%	13%	7%	10%	9%	5%
Full-time Homemaker	6%	7%	9%	5%	4%	10%	14%	22%	5%	6%	8%	2%	5%	5%	3%
Student	10%	6%	4%	8%	9%	5%	5%	3%	7%	5%	7%	10%	6%	4%	15%
Not Employed	3%	6%	9%	4%	7%	8%	8%	7%	1%	9%	8%	2%	4%	1%	1%
Retired	7%	27%	15%	14%	10%	24%	26%	10%	2%	23%	21%	9%	3%	5%	0%
Prefer not to answer	1%	2%	1%	3%	1%	1%	2%	2%	3%	3%	1%	3%	3%	2%	5%
Marital Status															
Married	41%	54%	52%	60%	52%	53%	51%	66%	57%	53%	54%	70%	64%	63%	30%
Single	54%	45%	44%	38%	42%	43%	45%	33%	42%	46%	44%	28%	34%	35%	68%
Prefer not to answer	6%	2%	4%	2%	6%	4%	4%	1%	2%	2%	1%	2%	2%	2%	2%

Please describe the make up of the children in your household.
Which of the following best describes your current employment situation?
Which of the following categories best describes your marital status?



Demographics

	Europe						Asia-Pacific			N. America		Internet Population*			
	Austria	France	Germany	Italy	Spain	UK	Australia	Japan	Singapore	Canada	US	China	India	Russia	Thailand
															
Gender															
Male	53%	48%	49%	53%	56%	49%	49%	48%	46%	49%	48%	56%	61%	51%	43%
Female	47%	53%	51%	47%	45%	51%	51%	52%	54%	51%	52%	44%	40%	49%	57%
Age															
18-34	46%	26%	25%	29%	42%	27%	29%	24%	46%	29%	30%	36%	62%	39%	78%
35-44	25%	20%	20%	22%	23%	20%	19%	17%	33%	19%	21%	29%	20%	21%	16%
45-54	19%	19%	28%	24%	20%	20%	21%	20%	17%	18%	19%	23%	11%	26%	6%
55+	10%	35%	27%	25%	14%	34%	31%	38%	5%	34%	30%	13%	7%	14%	1%

Please tell us your gender.
Please indicate your age.



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Disclaimer

Although the information in this update has been obtained from sources that Research International believes to be reliable, its accuracy and completeness cannot be guaranteed. This update is based on survey responses of respondents. This update is for information purposes only. All opinions and estimates included in this report constitute the views of survey respondents combined with our judgment as of this date and are subject to revision.

Surveys for this study were conducted by Research International during September/October, 2008. The survey was completed on-line by 15,000 respondents across 15 countries (1,000 per country). Estimates are by nature subject to error. Due to rounding numbers, sums may not add up to 100.

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