



Consumer Snapshot – Volume V

Social Media and the Spa-Goer



International SPA Association Foundation | October 2014



ISPA Foundation Consumer Snapshot Initiative

The ISPA Foundation commissioned PwC to conduct a nationally-representative U.S. survey program to provide valuable consumer insights. The fifth volume of this initiative takes a deeper look at social media usage trends and preferences among today's consumer. This volume also highlights key insights relating specifically to spa-goers and how they are using social media to research spas and share their experiences with others.

The snapshots offer invaluable insight into the real-life attitudes and opinions of a sample of the U.S. population at a point in time. The level of interest in the results has been remarkable, building on the success of the previous four volumes.

For the purposes of the study, a "spa-goer" is defined as a person who has visited/attended a spa at least once in the past 12 months. A 'non-spa-goer' is defined as either an 'inactive spa-goer' (a person who has visited/attended a spa before, but has not been to a spa in the past 12 months) or a 'non-spa-goer' (a person who has never visited/attended a spa).



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The popularity of social media sites

This study has found social media use to be hugely popular throughout the U.S. with 92% of the population (including 94% of females and 89% of males) having had experience of interacting with at least one social media platform. This extremely high level of uptake highlights the enormous influence of social media sites on the consumer population. These sites impact upon how people from all walks of life communicate, and not only with their friends and family, but also with other consumers and businesses.

In Volume V of the ISPA Consumer Snapshot we listed some of the most well-known sites to test for usage. Considering the sheer size and diversity of the U.S. population, it is striking to see the levels of social media interaction.

	Ever used	Frequently use*
Facebook	82%	68%
YouTube	75%	40%
LinkedIn	42%	16%
Twitter	41%	23%
Pinterest	38%	18%
Instagram	31%	18%

**Use at least once per week*

As measured by self-reported usage in this survey, Facebook is the leading social networking platform in the U.S. with 82% of survey respondents stating they had used it. Perhaps more significantly, it is also the site with the highest percentage of frequent users, indicating that it has a loyal and active following. YouTube with 75% reporting usage was second highest. Twitter has only been used by 41% of respondents, but it is significant for having a very active user base. LinkedIn is a widely used platform with a relatively inactive user base.

Engaged social media users

To better understand the true nature of social media use, this report focuses its attention on engaged social media users, and specifically on people who regularly interact with multiple social media platforms (referred to as avid users) and those people who actively contribute material to social media platforms (referred to as active contributors). While the uptake of social media is extremely high across the U.S. population, 49% of the population can be defined as 'avid users' and 29% as 'active contributors.'

Avid users and active contributors demographic profile

**25-34
years old**



**Household earnings
over \$50,000**



For the purposes of this report, engaged social media users are defined as someone who is both an avid user and active contributor. Engaged social media users are equally likely to be male or female, but tend to be younger and from a higher household income bracket than the average person in the U.S. The most popular age range for engaged social media users is between 25-34 years old, and they typically have a household income of over \$50,000.



Spa-goer usage

What is most exciting for the spa industry is that the demographic profile of the engaged social media user bears a remarkable resemblance to the profile of the spa-goer.

Spa-goer profile

**25-34
years old**



**Household earnings
over \$50,000**



Spa-goers are also much more likely to be in the 25-34 age range, and are typically from households with incomes over \$50,000. The only clear differentiating factor between the engaged social media user and the spa-goer is the tendency for spa-goers to have more females in their ranks.

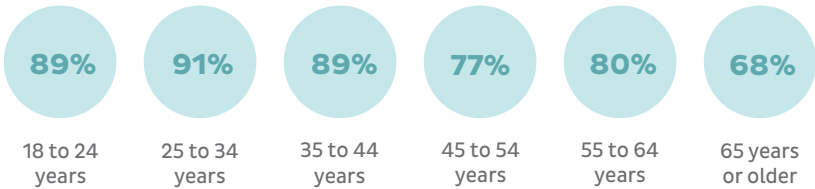
This current Consumer Snapshot has found a strong cross-over between spa-going and social media use. Ninety-eight percent of spa-goers have used social media and spa-going is very popular amongst active social media users. While the general spa-going incidence of the U.S. population in this study is 37%, 50% of avid social media users, and 62% of active contributors to social media have visited a spa in the past 12 months. This represents a great opportunity and challenge for the U.S. spa industry. This means social media has the potential to be an excellent forum for engaging with spa-goers. As a result, it is crucial that the spa industry understands the individual demographics and dynamics of the key social media sites.



The Facebook User

	% Who have used	% Who use frequently
All	82%	68%
Women	85%	74%
Men	79%	63%

% Who have used Facebook | Age



% Who have used Facebook | Household Income



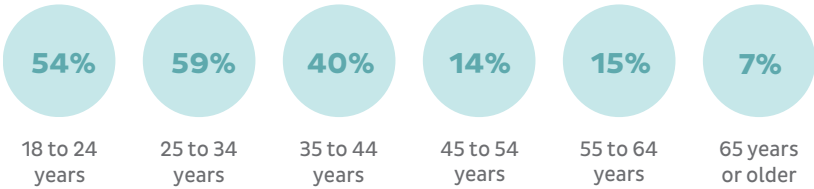
Facebook has maximized its membership base by appealing to people of all types and backgrounds; however, the profile of its members is slightly different than the general U.S. population. Facebook tends to be more popular among women than men, among the younger age groups and among the middle household income brackets (\$25,000-\$100,000) than either the highest or lowest.



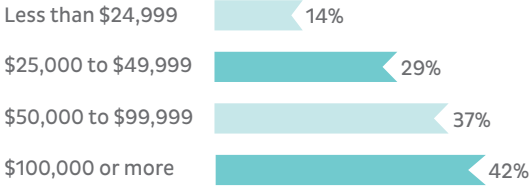
The Instagram User

	% Who have used	% Who use frequently
All	31%	18%
Women	31%	18%
Men	31%	18%

% Who have used Instagram | Age



% Who have used Instagram | Household Income



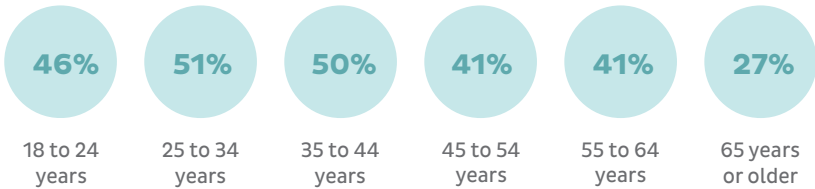
Instagram appeals equally to men and women, but is most popular among the millennial generation (18 to 34 year olds). Fifty four percent of 18 to 24 year olds and 59% of 25 to 34 year olds have used the platform, compared to only 31% of the general population. There is also a strong tendency for Instagram users to be found in higher income brackets with 42% earning more than \$100,000 compared to only 14% of people in households with incomes under \$25,000 having used the platform.



The LinkedIn User

	% Who have used	% Who use frequently
All	42%	16%
Women	41%	13%
Men	44%	20%

% Who have used LinkedIn | Age



% Who have used LinkedIn | Household Income



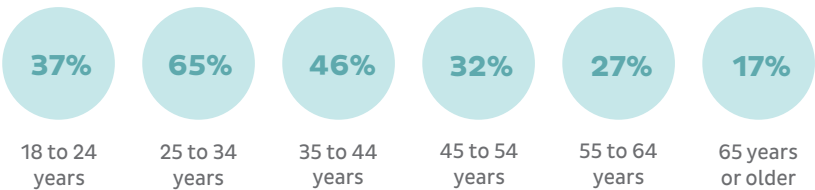
The professional networking site LinkedIn has a wide reach across the U.S. population; however, its frequent user base is not as strong as the other social media platforms. LinkedIn is slightly more appealing to men than women, and appeals most to people between 25 to 44 years old. The uptake of LinkedIn is strongly linked to income, with 60% of people in households with incomes of over \$100,000 having used the site, compared to only 28% of people in households with incomes under \$25,000.



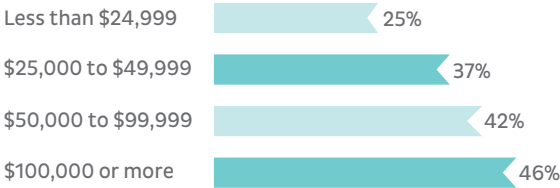
The Pinterest User

	% Who have used	% Who use frequently
All	38%	18%
Women	51%	25%
Men	23%	11%

% Who have used Pinterest | Age



% Who have used Pinterest | Household Income



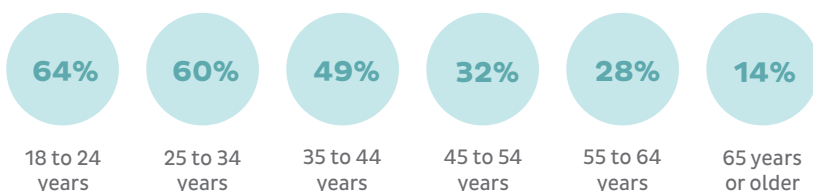
Pinterest appeals more to women, with 51% of women having used the site compared to only 23% of men. Pinterest users also have a specific age profile, with 25 to 44 year olds engaging with the platform most, especially those between 25 to 34 years old (65% of people in this age group have used Pinterest). The popularity of Pinterest increases as household income rises.



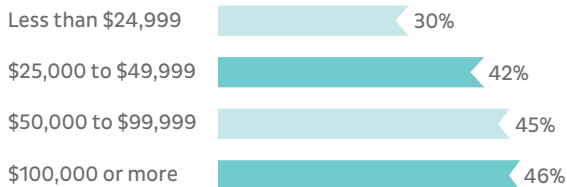
The Twitter User

	% Who have used	% Who use frequently
All	41%	23%
Women	36%	20%
Men	46%	26%

% Who have used Twitter | Age



% Who have used Twitter | Household Income



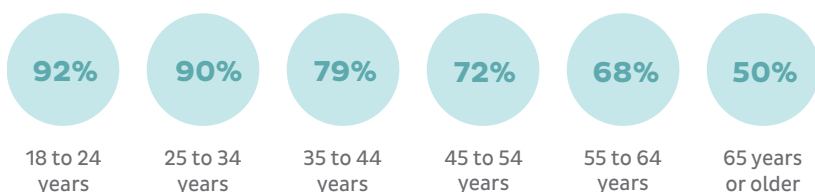
Twitter, the social media and microblogging website, has a dedicated core user group and has enjoyed the highest pickup among the younger age groups with 64% of 18 to 24 year olds having used Twitter. Twitter use also increases steadily with income, from a 30% level of use in households with an income of under \$25,000 to a 46% use in households with an income over \$100,000.



The YouTube User

	% Who have used	% Who use frequently
All	75%	40%
Women	75%	33%
Men	75%	48%

% Who have used YouTube | Age



% Who have used YouTube | Household Income



YouTube, the second most popular social media site, appeals to a more specific sub-section of the population than Facebook. It strongly appeals to youth, and its popularity peaks among 18 to 24 year olds (92% have used the site) and decreases significantly with age (half of 65 year olds and over have used the site). While the same proportion of men and women have interacted with the site, men are much more likely to be frequent YouTube users than women. YouTube has general appeal across the household income spectrum, but the typical user has a household income of over \$50,000.

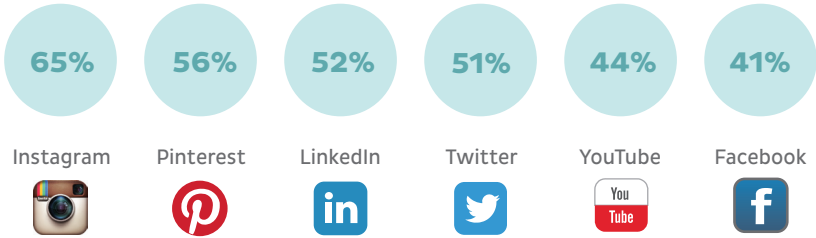
Which social media sites are most popular with frequent social media users?

	Spa-goer	Non-spa-goer
Facebook	80%	62%
YouTube	55%	32%
Twitter	30%	14%
Instagram	34%	9%
Pinterest	31%	10%
LinkedIn	30%	8%

A significantly higher percentage of spa-goers frequently interact with the main social media sites than non-spa-goers. In one sense then, posts by the spa industry on any social media platform should be effective at reaching a spa-going audience. However, some social media platforms appear to be particularly appealing to spa-goers. Instagram and Pinterest are more than three times more popular with spa-goers than non-spa-goers, perhaps highlighting a preference of spa-goers to communicate more through visuals rather than text announcements. In addition, their users are weighted towards female consumers, as is spa attendance.



% of users of each social media platform who are spa-goers



To look at it another way, if businesses within the spa industry are interested in targeting those social media platforms that have a concentration of spa-goers, then over half of the users of Twitter, LinkedIn, Pinterest and Instagram have visited a spa in the last 12 months, whereas the majority of Facebook and YouTube users have not. Across the board it is clear that spa-going is high. This means, that despite the fact that Facebook and YouTube are the platforms used by the highest percentage of spa-goers (and the general population as a whole), in some circumstances it may be more beneficial to post to other sites, with more defined user bases. In particular, Instagram, the picture posting platform, is a hub for spa-goers, so posts to this site might be more frequently engaged with and shared.



Peak use times of social media

This study was able to pinpoint the three most common times for people in the U.S. to use social media as the late evening (between 8 pm and midnight), the early evening (5 pm - 8 pm), and the afternoon (between 2 pm and 5 pm). Beyond this, two factors appear to determine the period of time a person interacts with social media most: their age and the social media platform they are using.

Time periods of most interaction with social media platforms for...



6 am - 8:59 am

9 am - 11:59 am



12 pm - 1:59 pm

18-24 years old	3%	11%	11%
25-34 years old	4%	10%	14%
35-44 years old	12%	14%	13%
45-54 years old	11%	17%	10%
55-64 years old	12%	20%	9%
65 years or older	10%	24%	13%

Time periods of most interaction with...



6 am - 8:59 am

9 am - 11:59 am

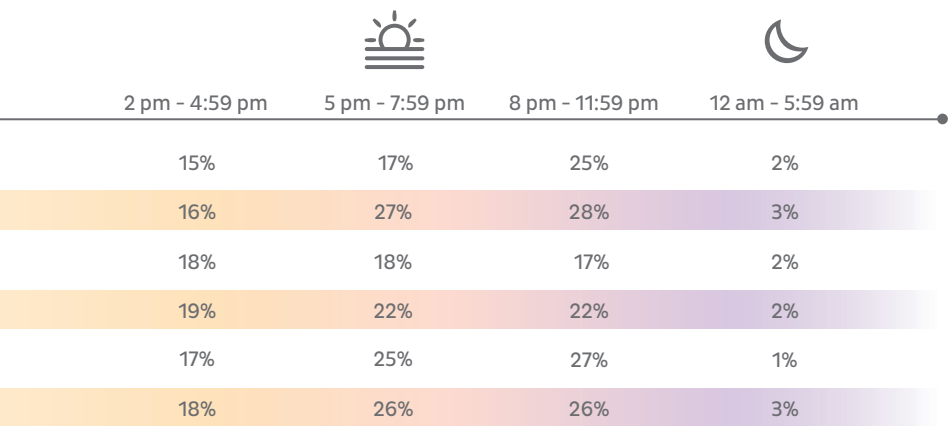
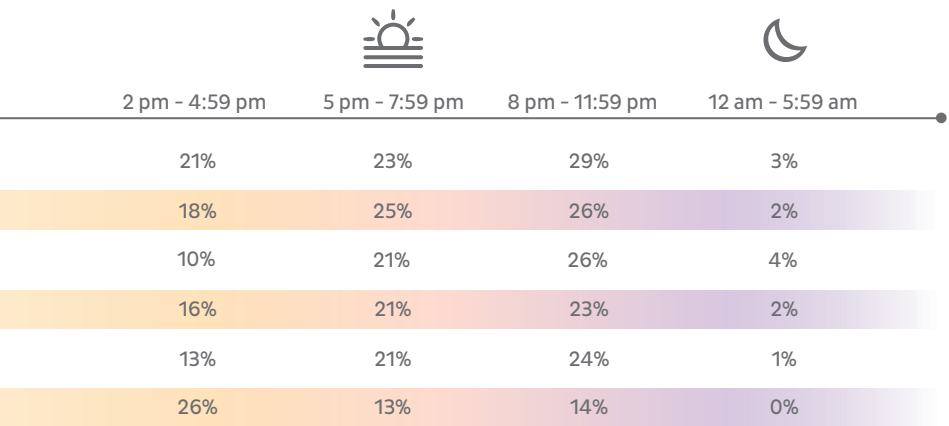


12 pm - 1:59 pm

Facebook	13%	18%	10%
YouTube	4%	10%	12%
LinkedIn	10%	20%	14%
Twitter	6%	15%	14%
Instagram	7%	10%	12%
Pinterest	4%	13%	10%



For all people of working age, the peak times of social media use are between 8 am -12 pm and 5 pm - 8 pm in the evening. Evening and late night social media use is especially popular amongst the youngest age groups, whereas a significant proportion of the 35-64 year old age group use social media most during the morning between 9 am and 12 pm. On the other hand, people over 65 years old tend to use social media earlier in the day.





Consumer activities on social media

	% of all U.S. population who do monthly	% of spa-goers who do monthly	% of non-spa-goers who do monthly
Research a product or service	52%	72%	40%
Complete an online survey	52%	66%	44%
Share pictures of a product or service	51%	69%	40%
Use an online promotion	42%	63%	30%
Purchase a product or service	39%	61%	25%
Provide a review or feedback	32%	55%	18%
Enter a competition	32%	50%	21%
Raise a customer service query	25%	44%	14%



Consumer activities on social media

To gauge how consumers actually use social media in relation to products and services, we can focus on the activities which people do on at least a monthly basis. Looking at the data, what first stands out is that consumers are more likely to use social media to gather and share information on products and services (i.e. by conducting research and completing online surveys) than to engage with the more conventional marketing (i.e. making purchases and using promotions). This pattern could be linked to the nature of the sales cycle, with more people engaging in pre-purchase activities such as research than in activities associated with attaining or reflecting on products and services.

Research, online survey completion and picture sharing top the list of the most popular social media activities among consumers. This suggests social media primarily functions for consumers as an information sharing resource. Two of these activities have a special appeal to women, with 54% of women completing surveys compared to 50% of men, and 55% sharing pictures compared to 46% of men.

A significant proportion of the U.S. population uses social media platforms to engage directly with businesses through promotions, purchases and competitions, with women being slightly more likely to do so than men. These activities are much more popular among the spa-going population than the non-spa-going population, and in fact a majority of spa-goers engage in these activities on a monthly basis.

Perhaps expectedly, the consumer activities that are engaged with least on social media are those that usually require a purchase or transaction to have already occurred. However, the consumers who engage with these activities may be disproportionately important to business growth because they are potential brand/product advocates. This study found that men are more likely than women to fall into this category, with a higher percentage of men providing reviews or feedback (35% versus 29%) and raising customer service queries and services (29% versus 22%). The spa industry should take note that male spa-goers may be more likely to use social media to reflect on their positive and negative experiences in spas than their female counterparts.



Consumer reflections on marketing

Social media sites have developed into spaces for consumer activity; however, they have so far failed to really engage the majority of consumers. With just two-fifths of people in the U.S. believing that social media sites empower them as consumers and allow their voices to be heard, businesses face a number of challenges when marketing in this space.

One major challenge for businesses is that many people doubt the reliability of the information posted on social media. While 43% of the general population feel social media helps them to research products and services, only 27% of people trust the reviews they read. The figures may be more encouraging for spa-goers, with 61% finding social media a helpful tool for researching products and services and 45% trusting social media reviews.

When it comes to direct business-consumer marketing on social media, advertisements are not particularly effective. Only one in five people click on the advertisements they see on social media, although this increases to two in five spa-goers. Businesses appear to already be aware that one of the best ways of securing new revenue streams for their products and services is through consumer endorsements. The key question here is how to encourage consumers to make endorsements and whether incentives are necessary. This study found that a relatively low proportion of people (three in ten in the general population, and four in 10 spa-goers) expect to receive an incentive when making an endorsement.

27% of people trust the reviews they read

1 in 5 people click on advertisements they see on social media

This increases to two in five spa-goers

Spa-goers using social media to connect



Female spa-goers



53%

have researched a spa



22%

have booked a spa treatment



29%

have provided a review or
feedback on spa experience



39%

have entered a competition
to win a spa treatment

Male spa-goers



55%

have researched a spa



35%

have booked a spa treatment



38%

have provided a review or
feedback on a spa experience



34%

have entered a competition
to win a spa treatment









According to the findings, many spa-goers are already using social media to interact with spa businesses and the majority have used platforms to research spas. In line with what has already been uncovered about consumer activities on social media, men are much more likely to provide a review of feedback on a spa experience than women. Men are also more likely to have booked a spa treatment via a social media platform; whereas, a higher proportion of women than men have entered a competition for a treatment.



Starting the conversation

Using social media to engage in health and wellness discussions

One way spas could generate interest in their offerings is by tapping into the most popular health and wellness topics that people research on social media.

	% of general population who research issue on a monthly basis	% of spa-goers who research issue on a monthly basis
 Fitness	33%	60%
 Nutritional advice	30%	51%
 Stress	26%	50%
 Alternative medicines	23%	42%
 Detox	13%	29%
 Giving up smoking	10%	21%



This study found that the top three health and wellness issues being researched by the general public on a monthly basis on social media are fitness (33%), nutritional advice (30%) and stress (26%). Spa-goers are much more likely than the general public to research health and wellness issues, but are interested in the same topics.



Closing the deal

Respondents were asked how likely they were to be influenced by each of the following features. A five-point scale was used where 1=not at all likely to be influenced and 5=very likely to be influenced.

Influencing factor	Overall spa-goer influence level	Male spa-goer influence level	Female spa-goer influence level
Spa treatment discounts	4.06	3.95	4.16
Mentions from friends/family	4.04	3.93	4.13
Promotional giveaways	3.90	3.83	3.96
Special discounts for followers	3.80	3.75	3.84
Photos of a spa facility	3.80	3.74	3.85
Last-minute appointment deals	3.51	3.46	3.56
Information about the benefits of a spa treatment	3.48	3.52	3.45
Healthy living tips	3.45	3.52	3.39
Mentions from someone you don't know	2.99	3.13	2.88

Spa treatment discounts have the biggest influence on the decision of spa-goers to visit a spa. The importance of discounting for driving increased revenue and loyalty has already been discussed in Volume II of ISPA's Consumer Snapshot, which found that 53% of spa-goers would travel more than 30 minutes to visit a spa offering a good discount. While this study confirmed this finding it also found that all promotions, from discounts on treatments and for followers, to promotional giveaways



and last-minute appointment deals, had a slightly greater influence on women's decision to visit a spa than men's.

After spa treatment discounts, mentions from friends and family are the strongest influencing factor on the public's decision to visit a spa. In fact, these mentions are a full one point more influential than mentions from strangers. This highlights the great return on investment that social media advocates represent for spas. Considering that these mentions have a much greater influence than information about the benefits of a spa treatment and healthy living tips posted by spas themselves, it may be worthwhile for spas to focus on inspiring their advocates to share their perspectives on spa-going rather than attempting to target new customers directly with informative posts.

Finally, when we take into account the much stronger influence that photos of a spa facility have over textual posts on a person's decision to visit a spa, it follows through that visuals should play a key part in a spa's social media marketing campaigns. Creating engaging, share-worthy visual posts and encouraging spa-goers to post their own photos to the sites, such as Instagram and Pinterest, that they engage with may be one of the most effective strategies for driving up spa visits.



Consumer Snapshot | Survey Methodology

The survey for Volume V of the Spa Consumer Snapshot Initiative quickly achieved a total of 1,014 responses from a sample of U.S. consumers representative of the age, income and regional distributions of the population as a whole. The survey utilized a panel technique and did not target spa-going persons in particular, so the natural completion levels allowed PwC to continue to monitor the incidence of spa attendance in the population. It is important to understand that the results regarding spa attendance are self-reported by the snapshot participants and are not official statistics, nor can they be expected to be in line with what spas report (in terms of overall spa-going numbers or demographic composition of those using the facilities).

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About the Foundation

The ISPA Foundation is the 501(c)3 arm of ISPA and was created in 1999 to serve the educational and research needs of the industry. The ISPA Foundation's mission is to improve and enhance the value of the spa experience; their vision is to advance spa culture to sustain health and well-being. To learn more about the Foundation or to make a donation to help support the continuation of the Consumer Snapshot Initiative, please visit experienceispa.com/ispafoundation.



About PwC

PwC firms provide industry-focused assurance, tax and advisory services to enhance value for their clients. More than 161,000 people in 154 countries in firms across the PwC network share their thinking, experience and solutions to develop fresh perspectives and practical advice. The International Survey Unit (ISU) is the PwC global Centre of Excellence for research, insight and analytics. For over 20 years we have undertaken some of the most prestigious and thought provoking research in Europe, the Americas and Asia Pacific, including the PwC Annual CEO Survey – now in its 17th year. PwC delivers insight and analysis for global clients, ranging from Fortune 500 companies to national governments, that informs strategy, drives performance improvement and supports change.



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