CONSUMER SNAPSHOT - VOLUME VI
CONSUMER PERCEPTIONS & PREFERENCES

International SPA Association Foundation | July 2015

ISPA Foundation Consumer Snapshot Initiative

The ISPA Foundation commissioned PwC to conduct a nationally representative survey program to provide valuable consumer insight to the spa industry in the United States. The sixth volume of this initiative extends the reach of the survey beyond the United States for the first time and in addition captures the views of consumers in the United Kingdom, Canada and Australia. This volume aims to shine a light on spa usage trends and perceptions of the spa industry around the world.

The Consumer Snapshot Initiative generates invaluable quantitative data for the spa industry on real-life attitudes and opinions of a sample of the population at a specific point in time. The level of interest in the results to date has been remarkable and builds on the continued success of the previous five volumes. As the first international edition of the series, this volume has been greatly anticipated.

For the purposes of this study, a “spa-goer” is defined as a person who has visited or attended a spa at least once within the last 12 months. A “non-spa-goer” is defined either as an inactive spa-goer (a person who has visited or attended a spa before but not within the last 12 months) or as someone who has never visited or attended a spa.

Table of Contents

Setting the Scene

The survey has been extended beyond the U.S. to include consumers in other parts of the world. As international commerce advances and demographics change, it is vital for the spa industry to understand its consumers and how perceptions of the spa industry compare across territories and between different sections of society.

This report looks beyond U.S. borders and highlights what motivates people to visit or, just as importantly, not to visit a spa, as well as gauging wider opinions on the spa industry as a whole.

	Australia	Canada	United Kingdom	United States	All
Spa-goers	38%	41%	44%	42%	41%
Non-spa-goers	62%	59%	56%	58%	59%

This study shows levels of spa-going to be remarkably similar across the four territories surveyed. Australia has the lowest total uptake, but interestingly it does boast the highest number of male spa-goers (50%), substantially higher than its global cousins. Men are less likely to visit spas in the United States and Canada, but very healthy numbers are reported, reinforcing the messages contained in the landmark Volume 5 report on Male Consumer Insights.

The majority of our spa-going respondents visit the spa between one and four times per year (83%). The highest proportion of frequent spa-goers are found in the U.S. and Australia, with one in five visiting a spa five times or more in the last 12 months.

Frequent spa-goer	21%	14%	11%	20%	17%
Infrequent spa-goer	79%	86%	89%	80%	83%
Base size of spa-goers	379	417	443	418	1657

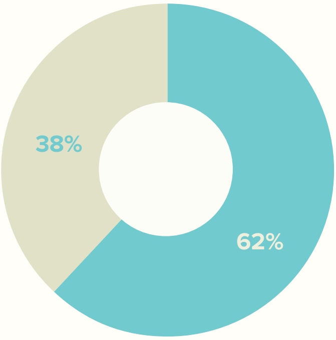
For the purposes of this study, infrequent spa-goers are defined as those who visited a spa up to four times in the last 12 months, while frequent spa-goers are those who visited a spa five times or more during the same period.

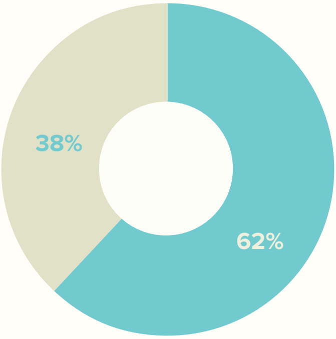
AUSTRALIA

The following provides an overview of the consumer audience in Australia:

PERCENTAGE OF THE TOTAL POPULATION WHO FREQUENT SPAS

- Spa-goer: 38%
- Non-spa-goer: 62%



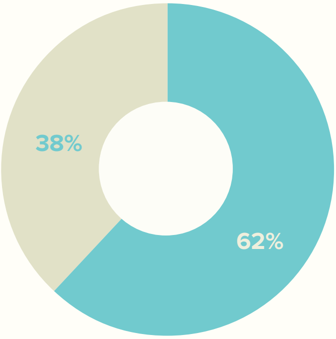


PERCENTAGE OF THE MALE POPULATION WHO HAVE VISITED A SPA WITHIN THE PAST 12 MONTHS

- Spa-goer: 38%
- Non-spa-goer: 62%

PERCENTAGE OF THE FEMALE POPULATION WHO HAVE VISITED A SPA WITHIN THE PAST 12 MONTHS

- Spa-goer: 38%
- Non-spa-goer: 62%



TOP REASONS FOR VISITING A SPA

TREAT MYSELF / INDULGE — 21%

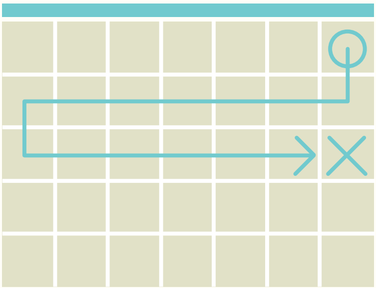
REDUCE / RELIEVE STRESS — 19%

TOP REASONS FOR NOT VISITING A SPA

DO NOT HAVE SPAS AVAILABLE IN MY AREA — 31%

TOO COSTLY — 27%

WHEN THE AVERAGE SPA-GOER BOOKS THEIR SPA APPOINTMENT



LESS THAN TWO WEEKS IN ADVANCE: 36%

MOST POPULAR TREATMENTS EXPERIENCED WITHIN THE PAST 12 MONTHS

67% MASSAGE

37% MANI / PEDI

36% FACIAL

TOP PRODUCTS PURCHASED DURING MOST RECENT SPA VISIT

50% BODY SCRUB

31% MOISTURIZER

INCENTIVES THAT INFLUENCE CONSUMERS THE MOST

DISCOUNT ON RETAIL PRODUCTS FOR REPEAT CUSTOMERS

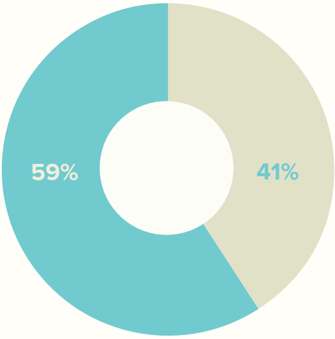
FREE SAMPLES OF NEW RETAIL PRODUCTS AND/OR SERVICES

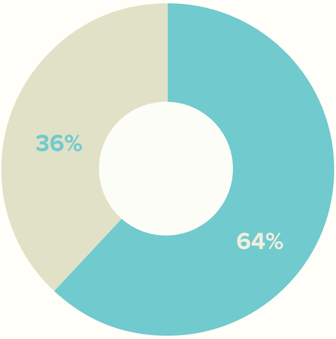
CANADA

The following provides an overview of the consumer audience in Canada:

PERCENTAGE OF THE TOTAL POPULATION WHO FREQUENT SPAS

- Spa-goer: 41%
- Non-spa-goer: 59%



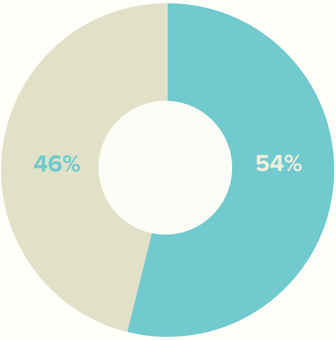


PERCENTAGE OF THE MALE POPULATION WHO HAVE VISITED A SPA WITHIN THE PAST 12 MONTHS

- Spa-goer: 36%
- Non-spa-goer: 64%

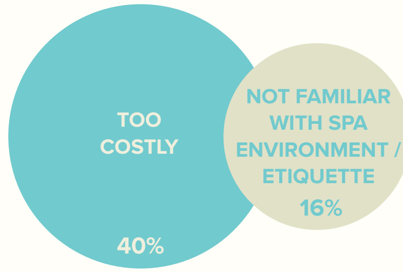
PERCENTAGE OF THE FEMALE POPULATION WHO HAVE VISITED A SPA WITHIN THE PAST 12 MONTHS

- Spa-goer: 46%
- Non-spa-goer: 54%

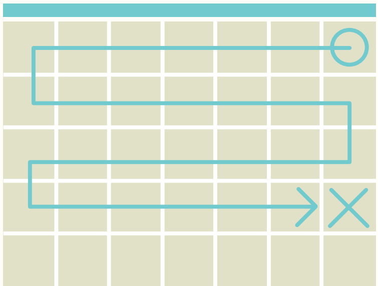


TOP REASONS FOR VISITING A SPA

TOP REASONS FOR NOT VISITING A SPA



WHEN THE AVERAGE SPA-GOER BOOKS THEIR SPA APPOINTMENT



TWO-TO-FOUR WEEKS IN ADVANCE: 30%

MOST POPULAR TREATMENTS EXPERIENCED WITHIN THE PAST 12 MONTHS

- 75% MASSAGE
- 44% MANI / PEDI
- 32% FACIAL

TOP PRODUCTS PURCHASED DURING MOST RECENT SPA VISIT

- 38% MOISTURIZER
- 32% BODY SCRUB

INCENTIVES THAT INFLUENCE CONSUMERS THE MOST

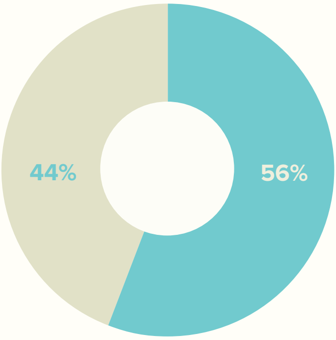
- DISCOUNT ON RETAIL PRODUCTS FOR REPEAT CUSTOMERS
- LOYALTY REWARDS PROGRAM FOR REPEAT PURCHASES

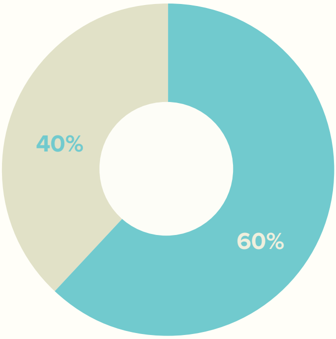
UNITED KINGDOM

The following provides an overview of the consumer audience in the United Kingdom:

PERCENTAGE OF THE TOTAL POPULATION WHO FREQUENT SPAS

- Spa-goer: 44%
- Non-spa-goer: 56%



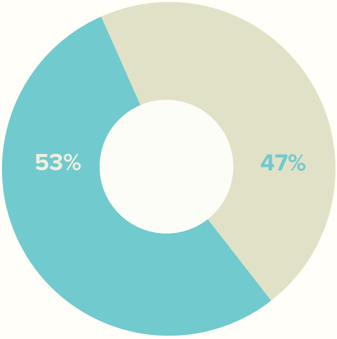


PERCENTAGE OF THE MALE POPULATION WHO HAVE VISITED A SPA WITHIN THE PAST 12 MONTHS

- Spa-goer: 40%
- Non-spa-goer: 60%

PERCENTAGE OF THE FEMALE POPULATION WHO HAVE VISITED A SPA WITHIN THE PAST 12 MONTHS

- Spa-goer: 47%
- Non-spa-goer: 53%



TOP REASONS FOR VISITING A SPA

TREAT MYSELF / INDULGE
30%

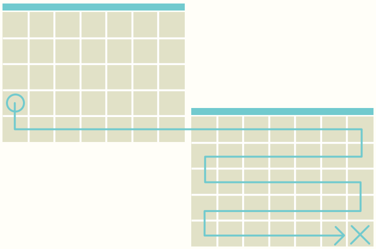
JOIN A FRIEND/RELATIVE AT THE SPA
19%

TOP REASONS FOR NOT VISITING A SPA

TOO COSTLY
27%

DO NOT HAVE SPAS AVAILABLE IN MY AREA
21%

WHEN THE AVERAGE SPA-GOER BOOKS THEIR SPA APPOINTMENT



MORE THAN 1 MONTH IN ADVANCE: 45%

MOST POPULAR TREATMENTS EXPERIENCED WITHIN THE PAST 12 MONTHS

71% MASSAGE

36% FACIAL

35% MANI / PEDI

TOP PRODUCTS PURCHASED DURING MOST RECENT SPA VISIT

33% MOISTURIZER

31% BODY SCRUB

INCENTIVES THAT INFLUENCE CONSUMERS THE MOST

FREE SAMPLES OF NEW RETAIL PRODUCTS AND/OR SERVICES

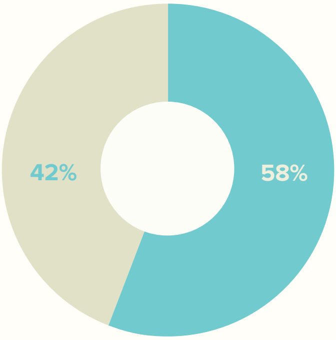
FREE GIFT AFTER A CERTAIN NUMBER OF PURCHASES

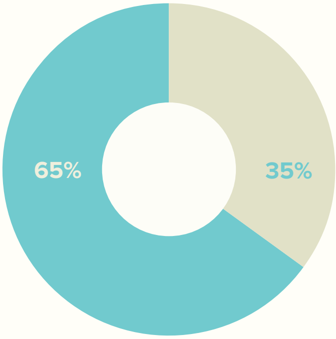
UNITED STATES

The following provides an overview of the consumer audience in the United States:

PERCENTAGE OF THE TOTAL POPULATION WHO FREQUENT SPAS

- Spa-goer: 42%
- Non-spa-goer: 58%



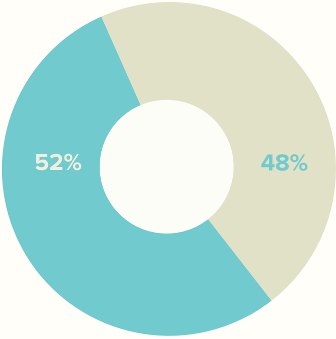


PERCENTAGE OF THE MALE POPULATION WHO HAVE VISITED A SPA WITHIN THE PAST 12 MONTHS

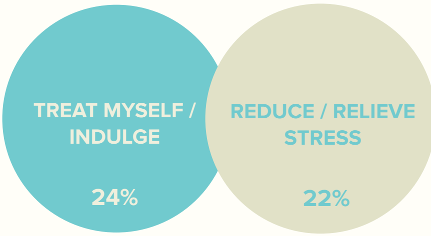
- Spa-goer: 35%
- Non-spa-goer: 65%

PERCENTAGE OF THE FEMALE POPULATION WHO HAVE VISITED A SPA WITHIN THE PAST 12 MONTHS

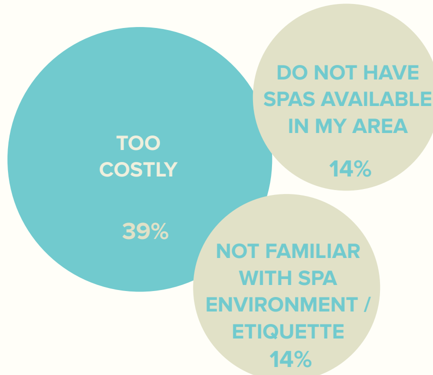
- Spa-goer: 48%
- Non-spa-goer: 52%



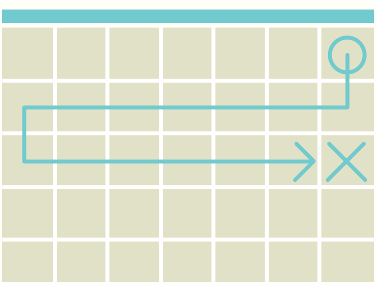
TOP REASONS FOR VISITING A SPA



TOP REASONS FOR NOT VISITING A SPA

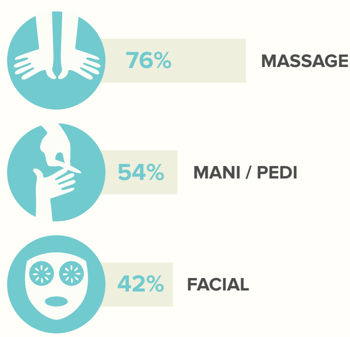


WHEN THE AVERAGE SPA-GOER BOOKS THEIR SPA APPOINTMENT

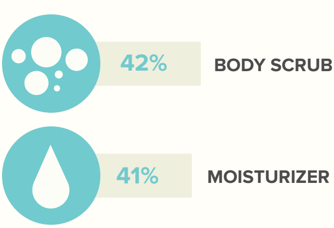


LESS THAN TWO WEEKS IN ADVANCE: 46%

MOST POPULAR TREATMENTS EXPERIENCED WITHIN THE PAST 12 MONTHS



TOP PRODUCTS PURCHASED DURING MOST RECENT SPA VISIT



INCENTIVES THAT INFLUENCE CONSUMERS THE MOST

Non-spa-goers | **What are the barriers?**

Previous ISPA consumer snapshot surveys conducted in the U.S. regularly flagged high costs as the main reason for not visiting a spa. This survey confirmed that Canadian consumers agree with their American counterparts, with 40% of Canadian non-spa-goers and 39% of U.S. non-spa-goers giving cost as one of their main reasons for not patronizing spas, compared to 27% outside the U.S. and Canada.

Furthermore, there are some distinct regional variations. Opinions about cost across the British regions differ only slightly, but perceptions in the U.S. and Canada vary markedly, with substantially more non-spa-goers in both the Southeast U.S. (51%) and in Western Canada (49%) indicating that spas are too expensive.

Non-spa-goers in Australia paint a slightly different picture, with a lack of available spas in their area being the main turn-off for almost one in three consumers (31%). Lack of available spas is also a deterrent for over a fifth of British non-spa-goers (21%). Once again, there are some interesting regional variations in the results. Consumers in Scotland and Northern Ireland are significantly more likely to point out a lack of available spas in their area than their English and Welsh counterparts, but in Australia there is little difference recorded between the different states. This is

both a challenge and an opportunity for the spa industry, representing an untapped base of consumers who have simply never had the opportunity of visiting a spa.

					
Too costly	27%	40%	27%	39%	33%
Do not have spas available in my area	31%	13%	21%	14%	20%
Not familiar with spa environment/etiquette	10%	16%	13%	14%	13%
Not comfortable visiting a spa	12%	14%	12%	11%	12%
Do not have enough time	9%	7%	12%	9%	9%
Too indulgent	4%	3%	5%	3%	4%

Why do people visit spas?

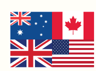
Understanding why people visit spas helps the industry to effectively engage consumers and motivate non-spa-goers to change their perceptions. “Indulgence” is the main driver for spa-goers in the U.S., UK and Australia, with only Canadians more commonly going to a spa to “reduce or relieve stress”.

Some other results stand out. Americans are more likely to visit a spa for aesthetic reasons – 14% claim their most recent visit was to improve their appearance. This reason is most frequently selected by millennials and frequent spa-goers. British spa-goers place more importance on the social angle of a spa visit, with almost a fifth using their most recent trip to “join a friend or relative at the spa” (19%). This is most common amongst females and infrequent spa-goers. Australians place more emphasis on using a spa for health and wellbeing benefits, with 16% attending a spa to “soothe sore joints or muscles.” This choice is most commonly selected by men and, perhaps unsurprisingly, those aged over 55.

“Understanding why people visit spas helps the industry to effectively engage consumers and motivate non-spa-goers to change their perceptions.”

					
Treat myself/indulge	21%	22%	30%	24%	25%
Reduce/relieve stress	19%	24%	14%	22%	20%
Join a friend/relative at the spa	12%	12%	19%	9%	13%
Soothe sore joints/muscles	16%	10%	8%	11%	11%
Improve my appearance	8%	10%	6%	14%	9%
Invest in overall wellness	9%	7%	9%	9%	9%
Utilize a gift card/certificate	3%	7%	4%	5%	5%
Lose weight	5%	4%	3%	4%	4%
Injury/illness	4%	2%	3%	2%	3%

When respondents were asked to describe the nature of their most recent spa visit, the answers were largely similar except in the UK. The most common choice in our survey was “a spa visit for a single treatment,” which was selected by almost half of all spa-goers (49%). But for British spa-goers, the favored response was “a spa day” (32%). Spa-goers in the UK were also significantly more likely than their international equivalents to visit a spa “as part of a hotel or resort package” (14%). At a global level, around a fifth of spa-goers (22%) claimed that their visit included more than one treatment, with this group including considerably more frequent spa-goers than infrequent spa-goers (34% compared with 20%).

					
A spa visit for a single treatment	54%	55%	31%	58%	49%
A spa visit for more than one treatment	26%	20%	21%	21%	22%
A spa day	10%	20%	32%	16%	20%
Hotel/resort package	7%	3%	14%	5%	7%

Infrequent spa-goers | **Why they don't go more often**

To ensure future growth of the industry, it is vital to increase the number of frequent spa-goers and to stimulate transition from infrequent spa-goer to frequent spa-goer. Of spa-goers who answered our survey, just 17% were identified as frequent spa-goers. Infrequent spa-goers' reasons for not visiting spas more often bear a noticeable similarity with many non-spa-goers' reasons for not visiting a spa in the first place. Without exception, cost is the main barrier, with approximately half of infrequent spa-goers in each country citing "too expensive" as an issue. Interestingly, a significant higher number of Canadian females (74%) than males (47%) chose this option. Likewise, a substantial number of British and Australian consumers stated that "travel distance to visit a spa" prevents them from attending more often, consistent with the responses given by non-spa-goers in the same countries.

					
Too expensive	49%	62%	46%	54%	46%
I don’t have enough time	35%	24%	32%	35%	32%
Can’t justify the cost of visiting more often	22%	27%	26%	27%	26%
Travel distance to visit a spa	11%	9%	13%	5%	13%
Too indulgent	8%	6%	6%	5%	6%
Can’t get anyone to go with me	6%	6%	6%	6%	6%
Difficulty getting an appointment when I want one	4%	4%	4%	4%	4%

Spa-goer habits

In this survey, we obtained a snapshot of spa-goers' habits relating to booking and spending patterns and how these vary internationally. In terms of booking patterns, British spa-goers show the highest levels of organization, with just under half booking their most recent visit at least a month in advance. Canadians were most likely to book their visit two to four weeks in advance. Australians, however, are the most spontaneous of those surveyed, with the highest proportion of spa-goers who did not book an appointment in advance of their visit (14%). Interestingly, those in the 65 years + age group were also likely to "walk in" (16% overall). Perhaps this is linked to retirement status and a less structured lifestyle.

> **When it comes to paying for a spa visit, the majority of respondents in each of the four countries pay for themselves.**

More than 2 months in advance	7%	5%	19%	10%	10%
1–2 months in advance	19%	17%	26%	14%	19%
2–4 weeks in advance	24%	30%	24%	24%	26%
1–2 weeks in advance	15%	20%	14%	18%	17%
Less than one week in advance	15%	18%	9%	21%	15%
Less than 24 hours in advance	6%	3%	2%	7%	5%
I do not book an appointment in advance	14%	8%	5%	7%	8%

When it comes to paying for a spa visit, the majority of respondents in each of the four countries pay for themselves. This is particularly commonplace in the U.S., with just over seven in ten spa-goers recording that they paid for their most recent spa visit themselves (71%). Canadians are more likely than the other nations to pay with a gift card (17%), and British spa-goers continue to underline the social aspect of a spa-visit, with a significantly higher share of friends or relatives covering the costs (14%).

I paid for my most recent spa visit	68%	66%	61%	71%	66%
I used a gift card/certificate to pay for my most recent spa visit	12%	17%	14%	14%	14%
A friend/relative visiting the spa with me covered the costs	9%	6%	14%	7%	9%
My spouse/partner covered the costs	4%	4%	6%	5%	5%
My employer covered the costs	3%	4%	0%	2%	2%
I received the spa visit for free	1%	2%	1%	0%	1%

Spa treatments | **Which are most popular?**

When it comes to the most popular treatments, there is a considerable amount of consistency across the four countries surveyed. Massage is overwhelmingly the top treatment, with almost three quarters of spa-goers (72%) across the four countries experiencing one within the last year. The second most-popular treatment is a manicure/pedicure, with the exception of the UK, where facials are preferred. Perhaps unsurprisingly, both of these treatments are significantly more popular amongst females — among men, approximately six in ten claimed to have never had a manicure/pedicure or a facial (62% and 58% respectively). The least popular treatment across the board is a mind and body experience. At least 40% of spa-goers in each country have never purchased this treatment although it is interesting to note that millennials are the age group most likely to have purchased a mind and body experience. This could make such treatments a potential area of growth in the future, as this age group gets older and their spending power increases. This is also reflective of their much discussed preference for "experiential" events.

Massage	67%	75%	71%	76%	72%
Manicure or pedicure	37%	44%	35%	54%	43%
Facial	36%	32%	36%	42%	37%
Fitness or movement classes	31%	25%	28%	31%	29%
Body scrub or wrap	24%	17%	23%	28%	23%
Aromatherapy	21%	18%	19%	31%	22%
Hydrotherapy treatment	22%	18%	21%	18%	20%
Mind/body experiences	18%	16%	12%	22%	17%

Retail items | **Where is the smart money?**

One way of gauging the spending habits of spa-goers is to determine the likelihood of buying different retail products during their visit. Some of the patterns identified may be a way of enabling spas to tailor their product offerings to more specifically reflect the desires of their customer base.

Across the four countries surveyed, around one in four spa-goers indicated that they bought retail products during their most recent spa visit (23%). Americans are the most likely spa-goers to buy a retail item (29%) and Canadians are least likely (18%). Looking in more detail at the data, some other interesting details stand out. There are many similarities in the four countries when the data are separated out into key demographics. Across the board, frequent spa-goers are more likely to purchase retail products (39%, compared with 20% of infrequent spa-goers); men are more likely than women to buy an item (27% compared with 20%); and millennials in each country are significantly more likely to make a purchase. Surprisingly there appears to be little correlation between household income and spending patterns on retail items.

When it comes to the retail products people buy, there are two clear favorites — body scrub and moisturizer. Body scrub is the top product in the U.S. and Australia, while moisturizer is the most popular choice for British and Canadian spa-goers. In total, Australian and British spa-goers are the biggest spenders on retail items, with just under half of those who bought a retail item spending at least $100 or £50 on their most recent visit (46% and 44% respectively). Canadians and Americans spend less, with 68% and 60% of those who bought retail products in the respective countries spending less than $100 during their most recent visit.

Body scrub	50%	32%	31%	42%	39%
Moisturizer	31%	38%	33%	41%	36%
Anti-aging skin care product	30%	17%	22%	26%	24%
Acne treatment	28%	25%	12%	26%	23%
Other skin care product	20%	12%	28%	13%	18%
Hair styling product	13%	16%	13%	20%	16%
Shaving product	14%	9%	19%	16%	15%
Sun care product	10%	9%	10%	11%	10%
Vitamin or health supplement	12%	18%	14%	12%	14%
Self-tanning product	12%	6%	7%	3%	7%

“Across the board, frequent spa-goers are more likely to **purchase retail products;** men are more likely than women to **buy an item;** and millennials in each country are significantly more likely to make a purchase.”

Spa Industry Perceptions | **What do consumers think?**

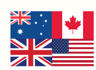
In order to test perceptions of the spa industry by both spa-goers and non-spa-goers, survey respondents were asked which words they associate with a spa experience. The findings highlight few differences in national perceptions, but the thoughts of spa-goers are different to those of non-spa-goers. The top word that spa-goers in each of the four countries associate with the spa experience is “relaxation.” Non-spa-goers in Australia and Canada agree, but, for their peers in the U.S. and UK, “pampering” is the word they most associate with the spa experience.

					
Beauty	31%	33%	31%	36%	33%
Escape	35%	42%	41%	46%	41%
Wellbeing	38%	34%	47%	32%	38%
Holistic	15%	13%	16%	14%	14%
Indulgence	51%	45%	51%	49%	49%
Luxury	45%	46%	47%	48%	46%
Pampering	54%	58%	65%	66%	61%
Relaxation	70%	68%	67%	71%	69%
Stress Relief	48%	53%	45%	58%	51%

Consumers were also asked to indicate their level of agreement with a series of statements relating to spas. Respondents used a five-point scale to identify their level of comfort where one is “strongly disagree” and five is “strongly agree.” Unsurprisingly, spa-goers across the board agreed more strongly that spas provide services that have a positive effect on health and wellness. Agreement with this statement was also highest amongst female respondents in each country.

Both spa-goers and non-spa-goers are in general agreement that spas are a place to relax and reduce stress. Spa-goers agree with this most strongly, with significantly higher levels of agreement than non-spa-goers. In a similar way, spa-goers and non-spa-goers tend to view spas as an indulgence, with spa-goers once again showing the strongest levels of agreement.

The most interesting responses were generated by the statement “spas are primarily for women” — a statement designed to test whether common stereotypes hold any water. Levels of agreement with this statement are notably higher amongst non-spa-goers in each of the four countries and, perhaps unsurprisingly, men generally agree with this statement more than women. But there is one exception — Australia, where females are in fact more likely to agree that spas are indeed primarily places for women.

					
Spas provide services that have a positive impact on my overall health & wellness	3.7	3.8	3.7	3.9	3.8
Spas are a place to relax and reduce stress	4	4.2	4.1	4.3	4.2
Spas are a place to indulge and treatments are a luxury	4	4.2	4.1	4.2	4.1
Spas are primarily for women	2.9	2.9	3.2	3	3

Discounting and incentivizing | **Strengthening the brand?**

Like any client-facing industry, spas need to continue finding ways to win new patrons while at the same time maintaining the support of their existing client-base. This survey evaluates to what extent discounting and incentives affect consumers' thought-processes in remaining loyal to a spa brand.

Across the four countries surveyed, opinions varied considerably, with consumers in the U.S. more likely to state that discounting increases the value of the brand, and those in the UK and Australia less likely to agree.

The overall data shows that spa-goers are in general more likely to be influenced by discounting and incentivizing than non-spa-goers. Almost half (47%) of spa-goers who responded stated that discounting "somewhat or significantly" increases the value of a brand, compared with 35% of non-spa-goers.

Millennials are particularly reactive to discounting and incentivizing. Almost half (48%) stated that discounting "somewhat or significantly" increases the value of a brand, compared with 36% in the over 35 age group. Striving to improve brand loyalty within this demographic should be a top priority for spas worldwide, with their purchasing power likely to increase in the coming years as they grow older.

						Spa-goer	Non-spa-goer
Increases value of the brand	37%	39%	36%	46%	40%	47%	35%

“Loyalty reward programs for repeat purchases” and “receiving free samples of the newest products or service offers” were considered by spa-goers to be the incentives most likely to encourage them to remain loyal to a brand. For non-spa-goers, a “discount on retail products for repeat customers” has the biggest influence. “Access to VIP events/appointment times” was considered by both spa-goers and non-spa-goers to be the least influential option in swaying their brand loyalty.

Loyalty rewards program for repeat purchases	3.5	3.6	3.7	3.4	3.5
Discount on retail products for repeat customers	3.7	3.3	3.7	3.6	3.5
Receive free samples of the newest products/ service offers	3.7	3.2	3.9	3.5	3.5
Free gift after a certain number of purchases	3.6	3.1	3.8	3.5	3.4
Custom birthday greeting with a special gift	3.4	2.8	3.7	3.2	3.2
Employees greet me by name & know my preferences	3.4	2.7	3.7	3.2	3.1
Discounts for referring friends	3.3	2.7	3.6	3.1	3
Access to VIP events/ appointment times	3.2	2.7	3.4	3	3

Spa-goer comfort | **It depends where you are**

Spa-goers were asked to rate how comfortable they feel about certain aspects of a spa visit. Respondents used a five-point scale to identify their level of comfort where one is "not comfortable at all" and five is "very comfortable." The results show that spa-goers feel considerably more comfortable in some situations than in others. American spa-goers appear to be the most comfortable with the different elements, whilst their Australian counterparts are consistently recorded as feeling the least comfortable.

The data shows that spa-goers uniformly feel most comfortable when making an appointment, with selecting a treatment coming a close second. Previous ISPA snapshot surveys revealed tipping practices to be an area of particular discomfort for U.S. consumers — this survey reiterates that theme in other parts of the globe. Nevertheless, tipping etiquette varies from country to country and our results show that in Australia and Britain, spa-goers report notably greater discomfort in this area than North Americans.

Making an appointment	4.2	4.4	4.4	4.5	4.4
Selecting treatment(s)	4.1	4.2	4.2	4.4	4.2
Tipping staff	2.9	3.7	3.1	4	3.5
Discussing treatment options or preferences with therapist	3.8	3.9	3.9	4.1	3.9
Knowing what to wear during a treatment	3.6	3.7	3.7	3.9	3.7
Walking into a spa to ask questions about treatment options/appointments	3.7	3.8	3.8	4	3.8

Survey methodology

This survey for Volume VI of the Spa Consumer Snapshot Initiative quickly achieved a total of 4,028 responses from a sample of consumers in Australia, Canada, United Kingdom and United States. The sample was selected based on the most up-to-date census data to make it representative of the age, income and regional distributions of the population as a whole. The survey adopted a panel technique and did not target spa-goers in particular. This allowed PwC to monitor the incidence of spa attendance in the population. It is important to remember 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).

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/about/ispa-foundation.

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