ISPA FOUNDATION

NEW ERA, NEW CONSUMER

ISPA CONSUMER SNAPSHOT XI, MAY 2022

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ISPA CONSUMER SNAPSHOT: NEW ERA, NEW CONSUMER

Like so much else, consumer attitudes and behaviors have evolved rapidly over the last two-plus years as the COVID-19 pandemic made its effects felt around the world. In March 2022, the ISPA Foundation commissioned the 11th edition of the ISPA Consumer Snapshot series to discover how those attitudes and behaviors may have shifted among spa-goers and non-spa-goers in that time.

Along with basic demographic information (age, gender, income level, etc.), the survey asked respondents to share information about their spa-going habits, their self-care practices (including those that take place at home) and their purchasing behaviors.

One of the most crucial takeaways from the data is that consumers' spa-going habits and needs exist on a broad spectrum, ranging from true non-spa-goers to those who both visit spas and utilize some manner of spa service in their homes. Overall, the study identified five distinct consumer types, or personas, whose demographic information and spa-going behaviors follow particular patterns. Throughout this report, those personas will be used to demonstrate the wide array of perspectives and behavior patterns that exist along the spa-going spectrum and provide insight into what those behaviors may mean for the spas seeking to reach new guests.

The survey results also indicate that spa services are in high demand and that a significant number of the spa-goers surveyed visited a spa for the first time during the pandemic.
That, combined with responses indicating the importance consumers are placing on mental and physical well-being, suggests that an increased focus on the importance of personal wellness is driving that demand to a meaningful degree.

Of course, high demand coupled with the well-documented staffing challenges facing the spa industry has led many consumers to face difficulties in booking spa appointments at their preferred date and time. This has led spa-goers to seek alternatives, including booking at a less desirable time, booking a different type of service, making appointments at other spas or trying at-home treatment options in lieu of (or in addition to) a traditional spa visit.

Ultimately, the data in this report reveals spa-goers to have a positive outlook on the future and an increased level of attention to their own health and well-being, which suggests an opportunity for the spa industry to serve their needs and, as a result, continue the industry's strong recovery from the lows seen in 2020.

FIVE KEY THINGS YOU NEED TO KNOW

Spa-going spectrum has identified a range of consumers that have different needs from spas

In this research we identified five groups of consumers across the spa going spectrum, Non-spa-goers (24%), lapsed spa-goers (10%), hybrid spa-goers (both in-person and in-home spa services) (47%), In-person only spa-goers (14%) and at home only spa-goers (4%).

The pandemic has increased the demand for spa services

More than half (58%) of current spa-goers stated that they visited a spa for the first time in the past two years with 48% stating that their first visit was a result of the pandemic. When asked about how the pandemic has affected their spa going pattern, 39% are going more often. Respondents want to return to pre-pandemic ways of in-person interaction in the spa environment.

Well-being is front and center — How can spas capitalize?

Mental well-being is a key area of focus for both spa-goers and non-spa-goers. However, spa-goers are likely to take more action to look after their mental well-being. Keeping stricter routines and using an app to manage well-being are the steps spa-goers are most likely to take.

Demand is so high, can spas deliver?

Around a third of current spa-goers stated they faced availability issues booking a spa appointment with the top issues being unable to get the time slot they wanted (35%), a price beyond what they were willing to pay (31%) and not getting the day they wanted (30%). When faced with these issues, current spa-goers used the money for a different service (39%) or accepted a time that was less convenient. However, spa-goers are less likely to accept a different therapist than their regular therapist.

Spa-goers are positive about the future - How can spas tap into this optimism?

Two-thirds of respondents stated they have a positive outlook on life and 65% of spa-goers stated that they will focus more on their health and well-being now. Travel is the area that Millennials are looking to spend more on travel in the next 12 months.

METHODOLOGY + DEMOGRAPHICS

To gather the data in this report, an online survey was distributed to 1,000 nationally representative U.S. consumers across all 50 states. Each respondent met one of the following criteria:

- They had never been to a spa.
- They had never been to a spa but have had a spa service provider come to their home.
- They had been to a spa, but not in the past 12 months.
- They had been to a spa in the past 12 months.

The types of consumers represented by the data can be sorted with relative neatness into five categories, each represented in this report as a different persona. These personas—including Hybrid Spa-goers, Lapsed Spa-goers and Non-spa-goers—offer insight into the typical behaviors demonstrated by spa-going and non-spa-going consumers alike.

A Non Spa-goer, for example, is likely a member of Generation X or the Baby Boomer generation and probably earns less than $75,000. A Lapsed Spa-goer is a consumer—likely a Baby Boomer—who has not visited a spa in at least 12 months, while a Hybrid Spa-goer is a consumer who has visited a spa in the last 12 months and has also utilized a spa service of some kind in their homes during that time.

The following section provides demographic information and typical behaviors for each persona, as well as a thorough breakdown of the age of respondents who align with each persona. This context is vital to a broader understanding of the factors that shape the habits and attitudes of a wide range of spa-goer and non-spa-going consumer types.

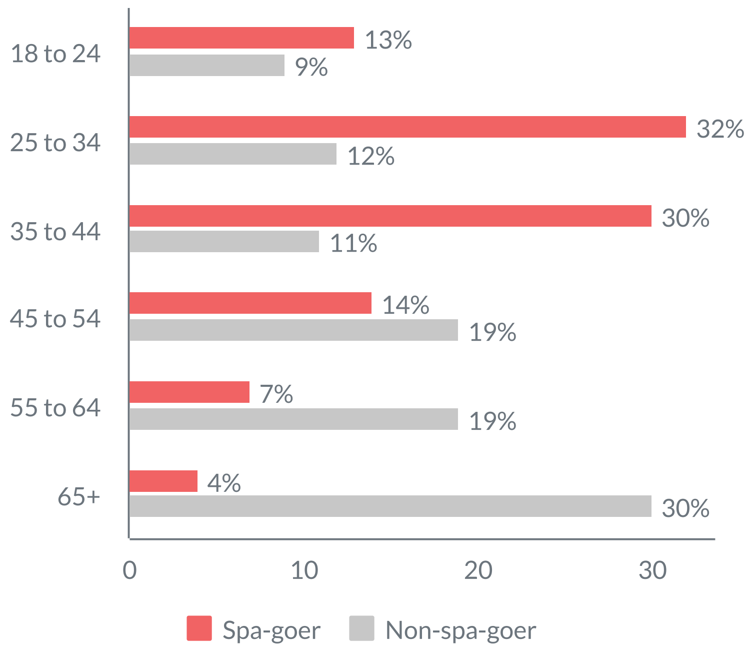
Where necessary, values have been rounded to the nearest whole number, and thus may not add up to 100% in some charts or graphs.

WHO TOOK PART

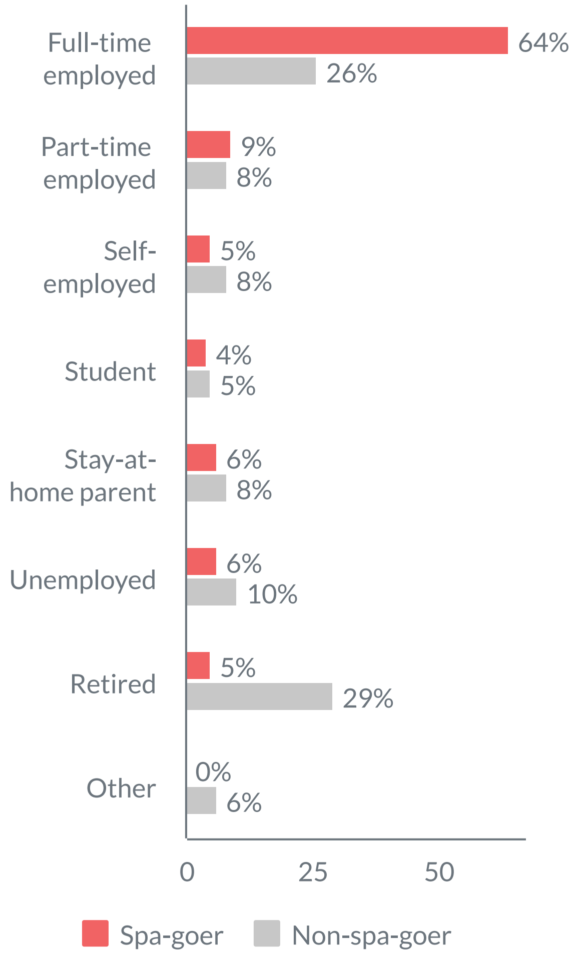
GENDER

	SPA-GOER	NON-SPA-GOER
Male	**49%**	**48%**
Female	**51%**	**51%**
Gender neutral	**1%**	**1%**

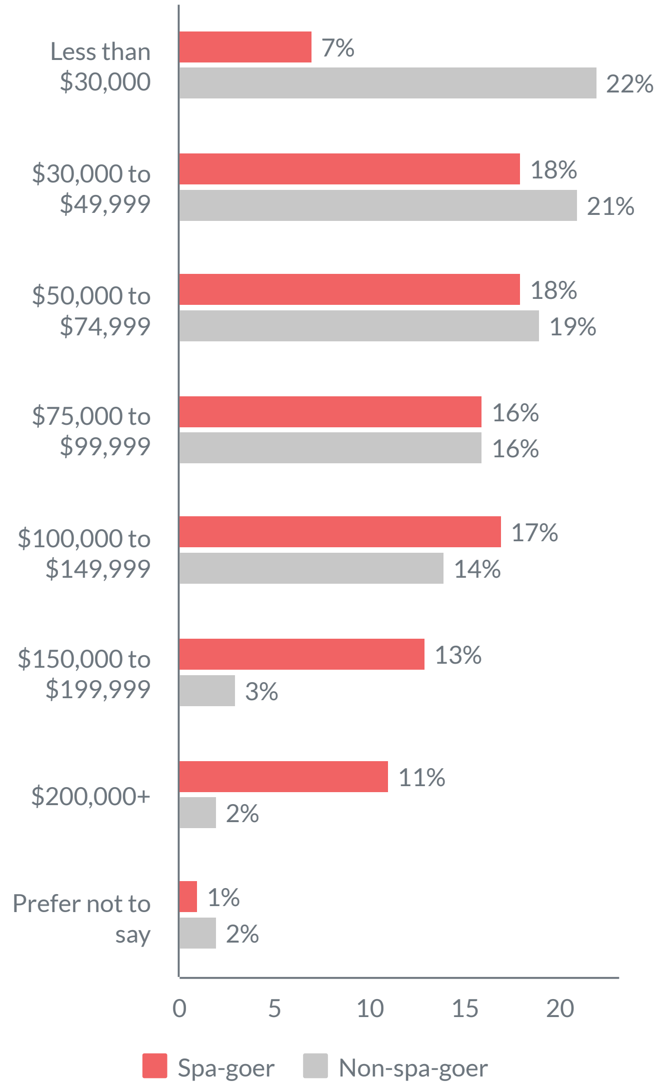
AGE



EMPLOYMENT



INCOME



THE SPA-GOER SPECTRUM

	SPA	SALON	FITNESS CENTER/ GYM	HAD A MASSAGE THERAPIST COME TO MY HOUSE (I.E. ZEEL, SOOTHE)
I have never visited/ had this service	27%	15%	16%	41%
I have not visited/had this service in the past 12 months, but I have previously	12%	14%	17%	8%
Once	18%	15%	10%	14%
2 to 4 times	23%	25%	16%	16%
5 to 7 times	12%	17%	15%	12%
8 to 10 times	5%	7%	10%	6%
More than 10 times	3%	6%	15%	3%

Spa-goer Lapsed Spa-goer Non-spa-goer

24% NON-SPA-GOERS	***Consumers that never use spas***	Either male or female Most likely to be Gen X or Baby Boomer More likely to earn less than $75,000
10% LAPSED SPA-GOERS	***Consumers that have not used a spa in the last twelve months***	Either male or female Most likely to be a Baby Boomers A medium range of incomes in this group ($50,000–149,000)
47% HYBRID SPA-GOERS	***Those that have used a spa in the last 12 months in-person and at home***	Either male or female Most likely to be a Millennial More likely to earn over $75,000
14% SPA-GOERS (IN-PERSON ONLY)	***Those that have visited a spa in the last 12 months***	More likely to be female Most likely to be a Millennial or Gen X A wider range of incomes in this group
4% SPA-GOERS (HOME ONLY)	***Those that only have spa treatments in their own home***	More likely to be male More likely to be a Millenial or Gen X Income between $30,000 and $100,000

CURRENT SPA-GOERS (applies to Hybrid, In-person only, and Home only rows)

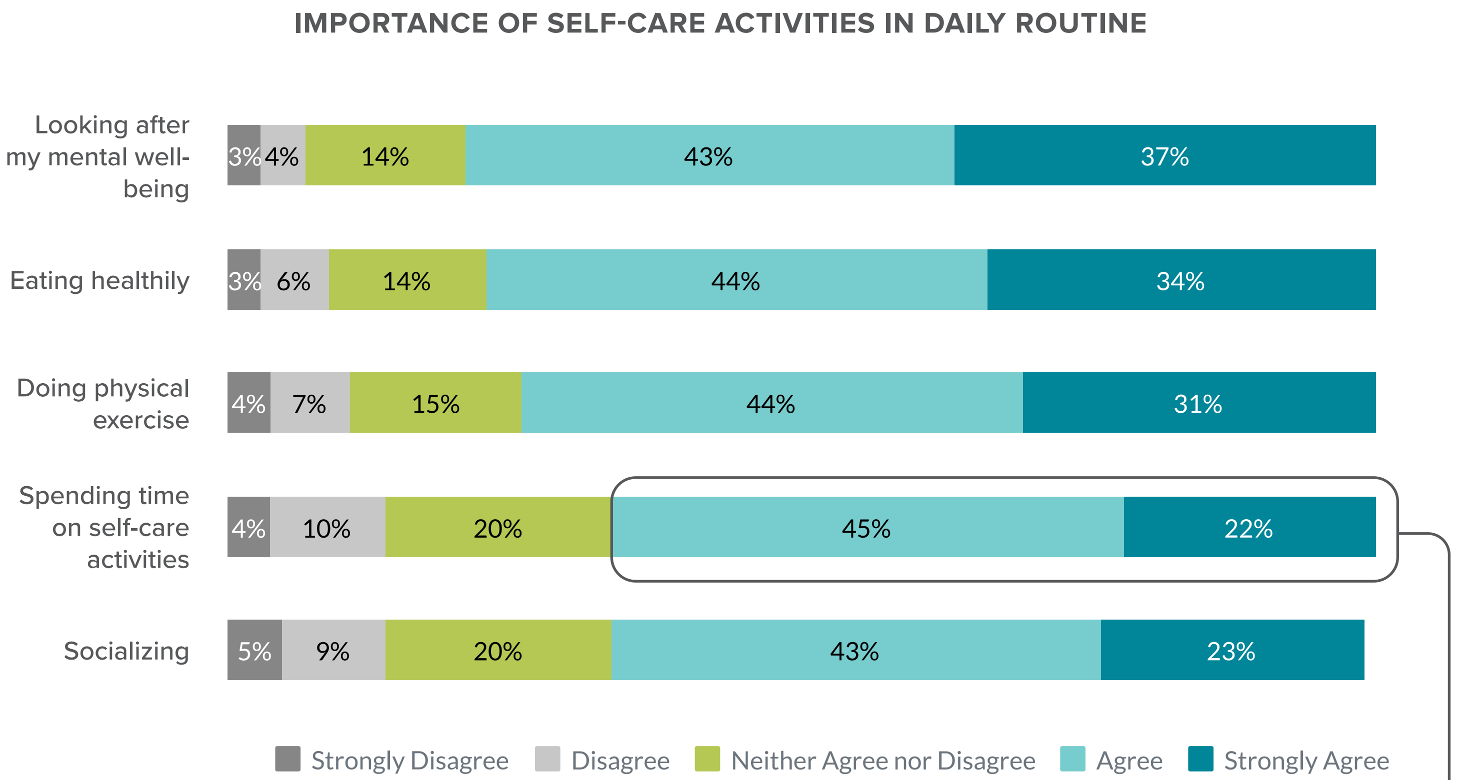
WELL-BEING

In addition to asking respondents about their spa-going and purchasing habits, the survey also asked them to share their views on well-being and self-care. The results indicate that mental and physical well-being are highly important to spa-goers and non-spa-goers alike, with 80% reporting that looking after their mental well-being is an important part of their daily routine and 78% saying the same about eating healthily. Three quarters of respondents indicated that physical exercise was important to their daily routine and two-thirds emphasized the importance of self-care activities.

For their part, spa-goers (74%), were more likely to describe self-care activities as important, compared to just 50% of non-spa-goers. Respondents with incomes above $75,000 (78%) were significantly likelier to say that self-care activities are important than those with lower incomes (60%), suggesting that self-care may be seen as a luxury to those consumers. From a generational perspective, millennials (73%) and Generation X (72%) were more likely than either Baby Boomers (59%) or Generation Z (58%) to identify self-care activities as important.

In keeping with their emphasis on self-care, a higher percentage of spa-goers reported taking concrete steps to look after their well-being than non-spa-goers ("Steps" include activities such as doing more exercise, socializing with friends and family more often and downloading an app to help manage mental well-being). The average current spa-goer has taken 2.5 steps to support their well-being, while that figure for non-spa-goers is just 1.8 steps. Spa-goers may also be turning to spa services to improve their well-being, as 85% of spa-goers reported trying a new spa activity—receiving a massage or participating in a mind/body experience, for example—in the past 12 months.

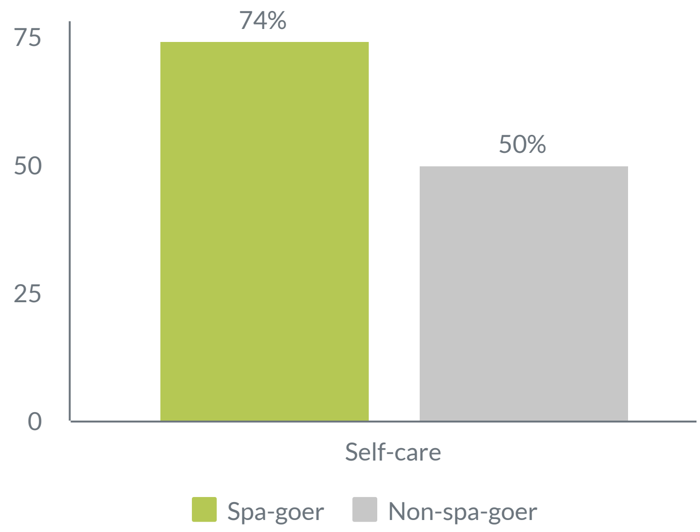
MENTAL & PHYSICAL WELL-BEING ARE THE MOST IMPORTANT PARTS OF RESPONDENTS' DAILY ROUTINES



Spending time on self-care was still an important part of daily routines for two-thirds of respondents.

THE IMPORTANCE OF SELF-CARE ACTIVITIES

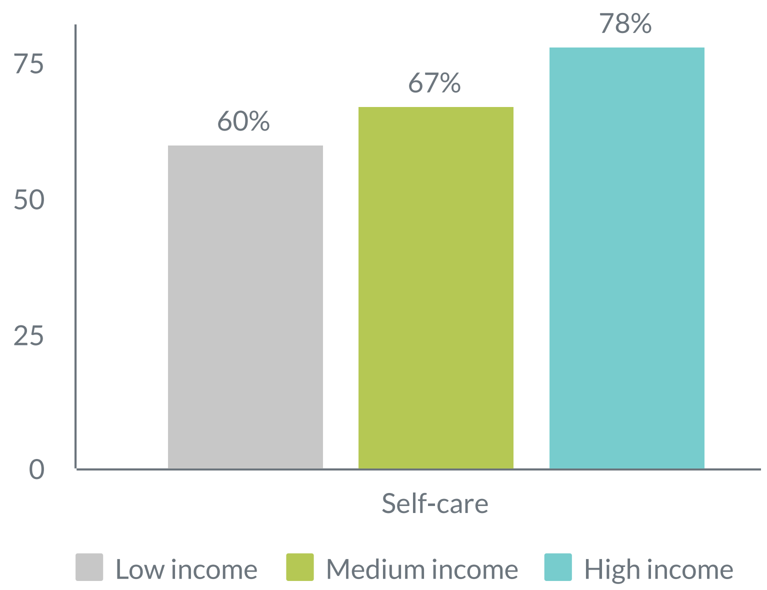
SPA-GOER VS. NON-SPA-GOER



Spa-goers (74%) see self-care activities as more important than non-spa-goers (50%).

INCOME

Those on high incomes are more likely to agree that it is important to spend time on self-care (78%) compared to low-income respondents indicating self-care activities are still seen as a luxury to today's consumers.



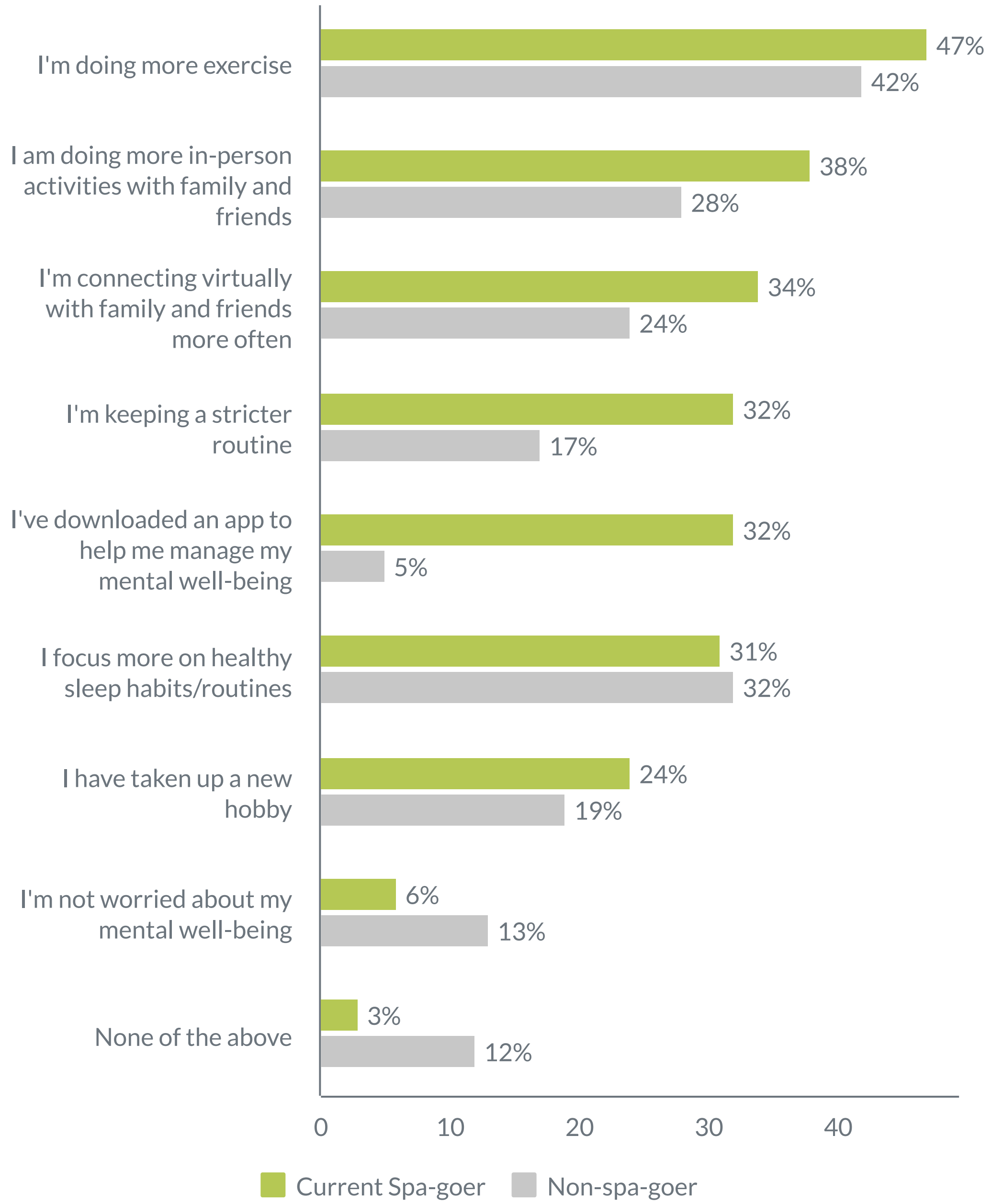
THE IMPORTANCE OF SELF-CARE ACTIVITIES BY GENERATION

58%	73%	72%	59%
GEN Z	MILLENNIAL	GEN X	BABY BOOMER

Millennials, along with Gen X, place the most importance on self-care (72% and 73%).

Baby Boomers, along with Gen Z place the least importance on self-care activities (59% and 58%).

THE PAST 12 MONTHS OF WELL-BEING

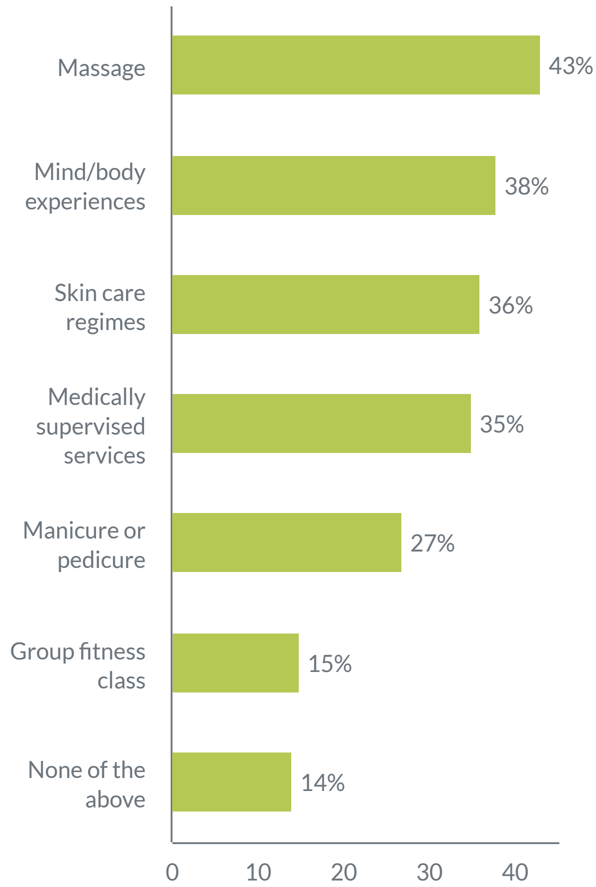


Spa-goers overall took more action to address their mental well-being compared to non spa-goers.

On average, current spa-goers had taken 2.5 steps to look after their mental well-being while non-spa-goers took 1.8 steps.

Spa-goers are also more likely to download an app to manage their mental well-being as well as keep stricter routines.

NEW SELF-CARE ACTIVITIES TRIED IN THE PAST 12 MONTHS



Current spa-goers were most likely to have had a massage for the first time in the past 12 months.

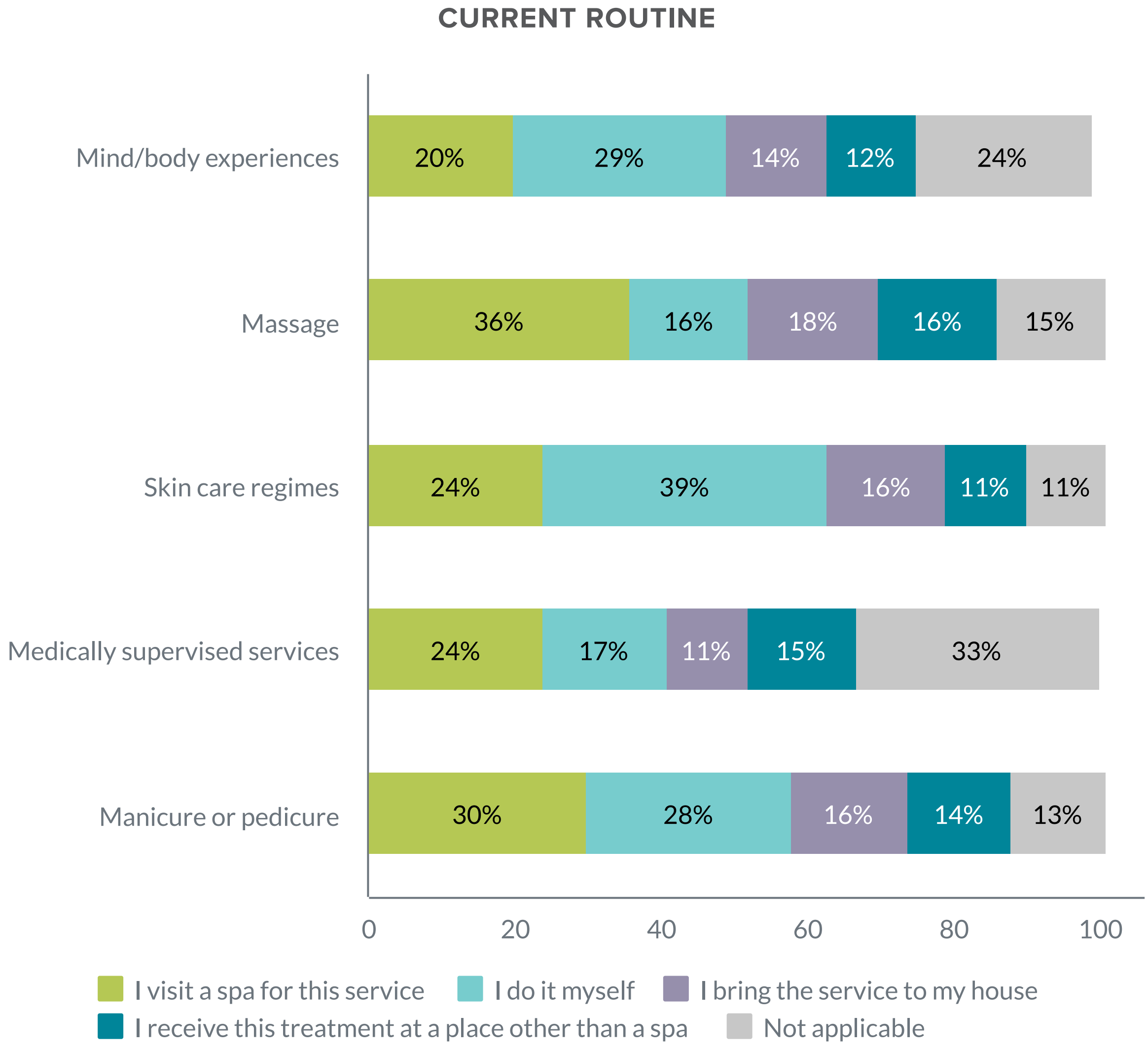
85%

have tried a new activity in the past 12 months, led by Gen Z (93%) and Millennials (91%).

Millennials were more likely to try mind/body experiences (46%).

Male spa-goers were more likely to try mind and body experience for the first time (46%) compared to females (30%) or medically supervised services (42% vs. 28% for females).

While a third of spa-goers do their skin care routines, manicures/pedicures and mind/body experiences at home, the majority prefer to visit a spa for their massages.



Male respondents feel more comfortable bringing massage services into their home (21%) compared to females (14%).

Gen Z respondents are more likely to try other methods of getting a massage with 27% preferring to visit a spa for the service.

PURCHASING BEHAVIORS

Almost a third of respondents expect to spend more money on vitamins, while the majority of spending habits remain the same.

	BUYING MORE THAN USUAL	BUYING THE SAME AMOUNT	BUYING LESS THAN USUAL	DON'T BUY THESE PRODUCTS
Vitamins/ supplements	**31%**	**48%**	**12%**	**10%**
Hair styling products	**22%**	**45%**	**17%**	**17%**
Moisturizers/ serums	**19%**	**48%**	**16%**	**18%**
Aromatherapy/ candles/scents	**19%**	**43%**	**17%**	**22%**
Body scrubs	**16%**	**44%**	**18%**	**23%**
Anti-aging skin care products	**18%**	**40%**	**13%**	**30%**
Makeup	**16%**	**36%**	**18%**	**31%**
CBD products	**18%**	**26%**	**12%**	**44%**
Nail polish	**14%**	**30%**	**22%**	**34%**

WHERE PRODUCTS ARE MOST OFTEN PURCHASED

LARGE CHAIN STORE

49%	Body scrubs
37%	Anti-aging skin care products
41%	Moisturizers/serums
38%	Nail polish
45%	Aromatherapy/candles/scents
47%	Hair styling products
44%	Vitamins/supplements

COSMETICS RETAILER

38%	Makeup

DRUGSTORE

32%	CBD

Around two-thirds of non-spa-goers buy their products in large chain stores.

For the majority of products, respondents bought their wellness products from large chain stores.

VISITING A SPA

Throughout the pandemic, questions have arisen about the effects that the pandemic itself, along with the apparent increase in concerns about personal health and well-being, have had on consumers' spa-going habits. The data suggests a strong connection.

Nearly six in 10 (58%) of current spa-goers stated that they visited a spa for the first time at some point in the last two years, and nearly half (48%) of current spa-goers reported visiting a spa for the first time specifically as a result of the pandemic. Almost eight in 10 respondents who said they are going to the spa more often indicated that they first visited because of the pandemic.

Interestingly, the top reason respondents cited for visiting a spa was to improve their appearance (24%), while 17% said that reducing or relieving stress was their primary motivation for a visit, and 14% indicated that investing in their overall wellness was the chief factor.

There are also, of course, factors that contribute to individuals' reluctance to visit a spa, with cost being the top reason given by respondents. This is true for current spa-goers (40%), non-spa-goers (54%) and lapsed spa-goers (57%). Other frequently cited factors include not having enough time to visit a spa, concerns about COVID-19 and a lack of comfort in spas or familiarity with spa etiquette.

High demand for spa services has persisted throughout the industry despite the widespread increase of service prices. This has led some to speculate that price sensitivity may not be a major concern regarding consumer behavior, although this data suggests that—at least for certain groups—rising prices may ultimately deter a meaningful number of existing and potential spa-goers from visiting spas more regularly (or visiting them at all).

NEW ERA, NEW CONSUMER

58%

of current spa-goers stated that they visited a spa for the first time in the last two years.

This is driven primarily by Gen Z (64%) and Millennial (51%) respondents.

Fifty-two percent of respondents who started visiting spas in the past two years plan to go more often now.

48%

of current spa-goers stated that they visited a spa for the first time as the result of the pandemic.

Seventy-seven percent of those who are going to the spa more often stated their first visit to a spa was a direct result of the pandemic.

Fifty-nine percent of current spa-goers who visited a spa for the first time in the past two years did so as a direct result of the pandemic.

24%

go to the spa less often.

37%

visit the same amount.

39%

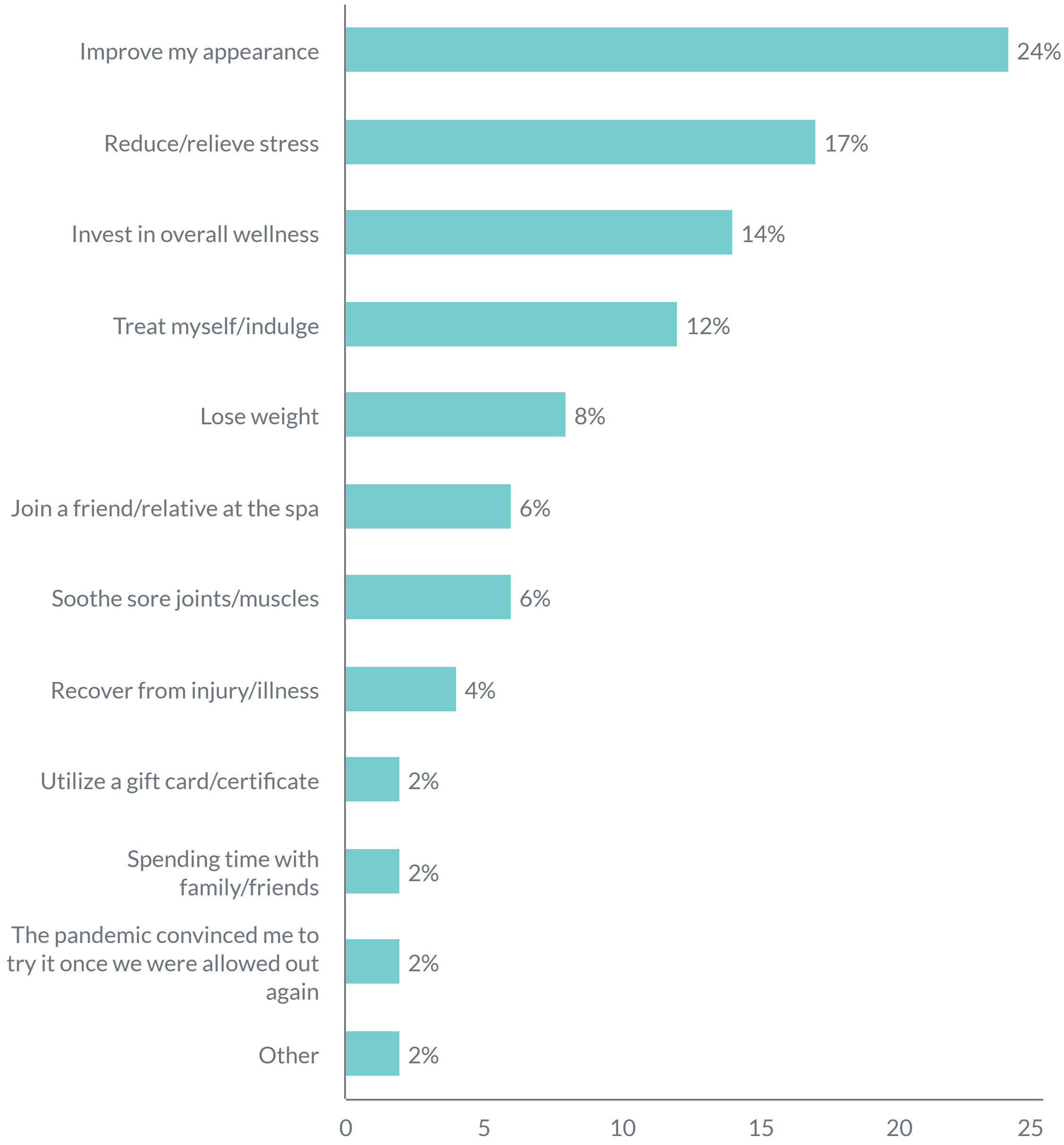
go to the spa more often.

The pandemic has impacted the consumer behavior with over half of male spa-goers stating they go to the spa more often. Fifty-three percent of Millennials also stated they go to the spa more often. One-third of Baby Boomers go to the spa less often as a result of the pandemic.

Income also plays a significant role as those on high incomes are three times as likely to go to a spa more as a result of the pandemic (67%) compared to low income respondents (21%).

WHY CONSUMERS VISIT SPAS

REASON FOR MOST RECENT SPA VISIT



REASON FOR MOST RECENT SPA VISIT (BY GENERATION)

	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS
Improve my appearance	19%	30%	28%	8%
Reduce/relieve stress	14%	18%	19%	18%
Invest in overall wellness	13%	11%	19%	14%
Treat myself/indulge	14%	12%	11%	14%
Lose weight	12%	9%	5%	5%
Join a friend/relative at the spa	11%	6%	6%	5%
Soothe sore joints/muscles	5%	5%	3%	12%
Recover from injury/illness	5%	5%	3%	7%
Utilize a gift card/certificate	1%	3%	0%	6%
Spending time with family/friends	5%	2%	2%	2%
The pandemic convinced me to try it once we were allowed out again	3%	1%	2%	3%
Other	0%	1%	2%	5%

REASON FOR MOST RECENT SPA VISIT (BY SPA-GOER TYPE)

	CURRENT SPA-GOER	LAPSED SPA-GOER	IN-PERSON ONLY	AT HOME ONLY*
Improve my appearance	**27%**	**7%**	**16%**	**17%**
Reduce/relieve stress	**18%**	**15%**	**26%**	**19%**
Invest in overall wellness	**14%**	**11%**	**10%**	**26%**
Treat myself/indulge	**11%**	**19%**	**19%**	**10%**
Lose weight	**8%**	**4%**	**6%**	**10%**
Join a friend/relative at the spa	**7%**	**6%**	**5%**	**2%**
Soothe sore joints/muscles	**4%**	**14%**	**5%**	**7%**
Recover from injury/illness	**5%**	**4%**	**5%**	**2%**
Utilize a gift card/certificate	**2%**	**4%**	**4%**	**0%**
Spending time with family/friends	**2%**	**2%**	**3%**	**2%**
The pandemic convinced me to try it once we were allowed out again	**2%**	**1%**	**1%**	**0%**
Other	**0%**	**13%**	**0%**	**5%**

**Respondents who received a spa service at home were counted as having visited a spa.*

WELLNESS IS THE KEY

REASONS FOR FIRST EVER VISIT TO THE SPA

	CURRENT SPA-GOERS	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS
I wanted to boost my overall wellness	**57%**	**48%**	**58%**	**69%**	**39%**
The pandemic convinced me to try it once we were allowed out again	**37%**	**36%**	**46%**	**31%**	**11%**
It was a spur of the moment decision	**34%**	**33%**	**35%**	**37%**	**24%**
Friends/family were also trying it	**36%**	**28%**	**42%**	**34%**	**24%**
I was swayed by social media posts	**19%**	**15%**	**20%**	**25%**	**3%**
I had been thinking about trying for a while	**21%**	**12%**	**19%**	**30%**	**16%**
My doctor and/ or therapist recommended it	**6%**	**3%**	**5%**	**7%**	**11%**

REASONS FOR FIRST EVER VISIT TO THE SPA

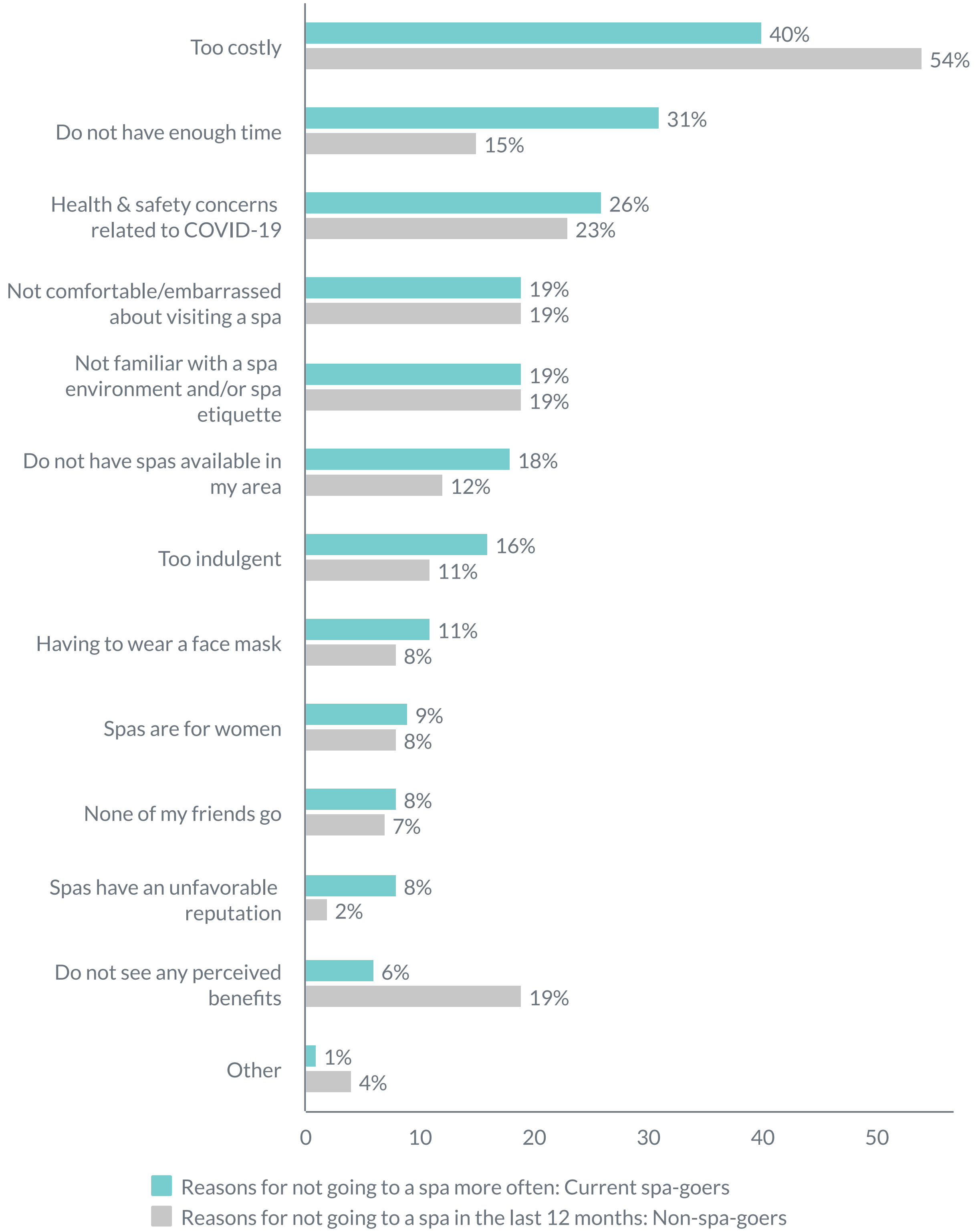
	MALE	FEMALE
I wanted to boost my overall wellness	65%	49%
The pandemic convinced me to try it once we were allowed out again	37%	36%
It was a spur of the moment decision	37%	30%
Friends/family were also trying it	41%	30%
I was swayed by social media posts	22%	15%
I had been thinking about trying for a while	18%	23%
My doctor and/or therapist recommended it	5%	6%

The focus on wellness continues with over half of new spa-goers deciding to go to boost their wellness. Other key drivers include celebrating the end of lockdown and family and friends trying it.

Sixty-five percent of males and 69% of Gen X attended for the first time to boost their overall wellness.

Millennials were more likely to try it as a way to celebrate the end of lockdown with 46% selecting this option.

WHY THEY ARE NOT VISITING SPAS



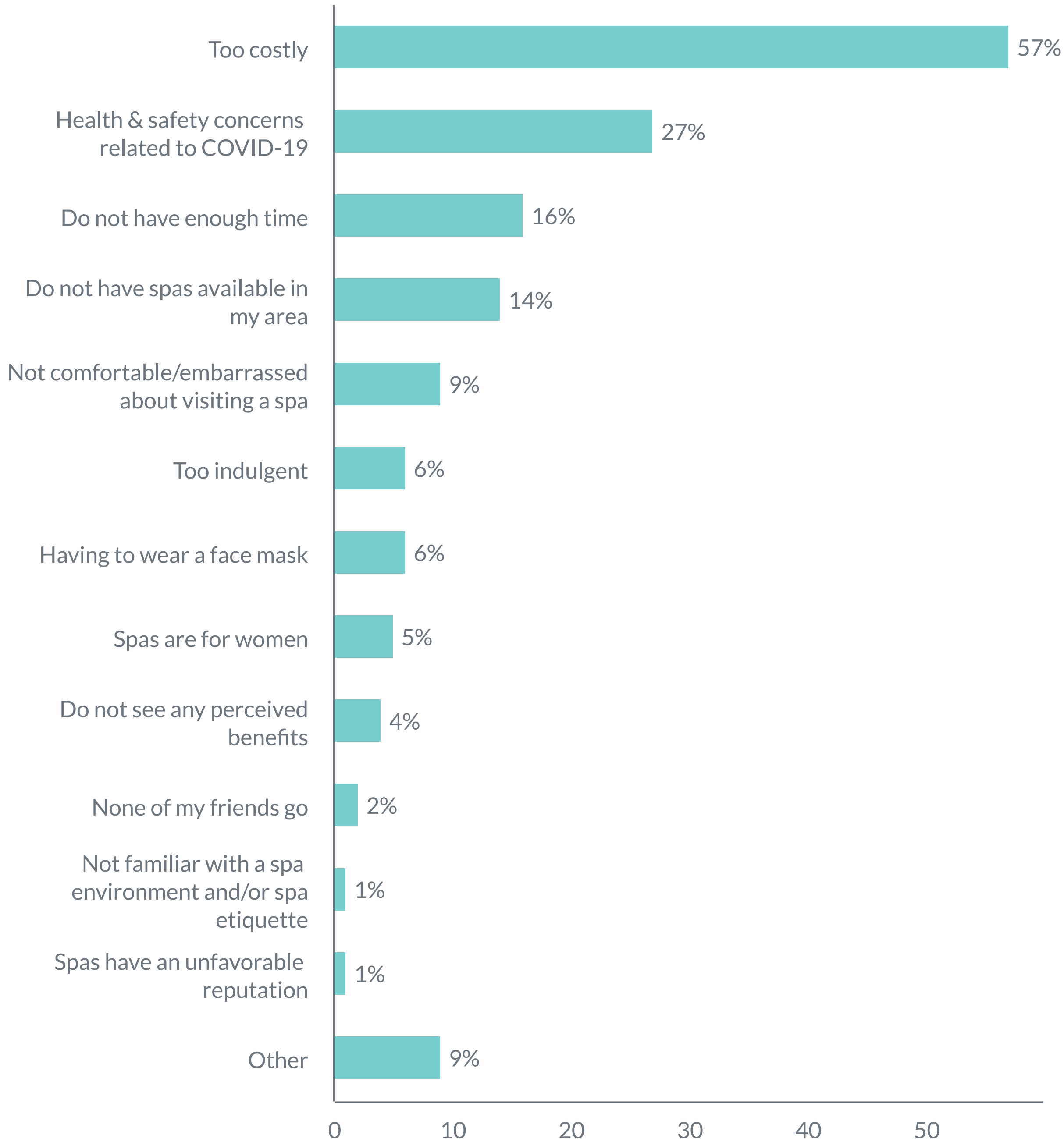
73%	of millennials cite cost as an obstacle to visiting the spa.
20%	of other non-spa-goers do not see the benefit of going to the spa.
29%	of male non-spa-goers do not see the benefit of attending a spa.

Cost is also an issue for spa-goers. However, the length of time it takes and worries about COVID-19 are also acting as a barrier.

Cost is less of a concern for male spa-goers (38%); however, a fifth are not familiar with the spa etiquette.

Cost is the top reason keeping lapsed spa-goers from returning

REASONS LAPSED SPA-GOERS DO NOT RETURN MORE OFTEN



SPA EXPERIENCE

A number of external factors influence spa-goers' decision to visit a spa, with online reviews (32%), convenience of location (32%), social media (31%) and word of mouth (30%) each having a roughly equal impact on that decision.

Whatever the reason for their visits, spa-goers are frequently facing difficulties booking service appointments due at least in part to high demand and staff shortages. Thirty percent of spa-going respondents indicated that they had faced availability delays or issues when booking spa appointments, which is lower than medical appointments (37%) and hair appointments (33%), but higher than car repairs (24%) or hotel bookings (19%).

When facing these types of difficulties booking spa services, respondents typically booked a different service type (39%) or accepted a less convenient time (36%). A third of respondents simply booked an appointment at a different spa, while 31% attempted to replicate the service at home.

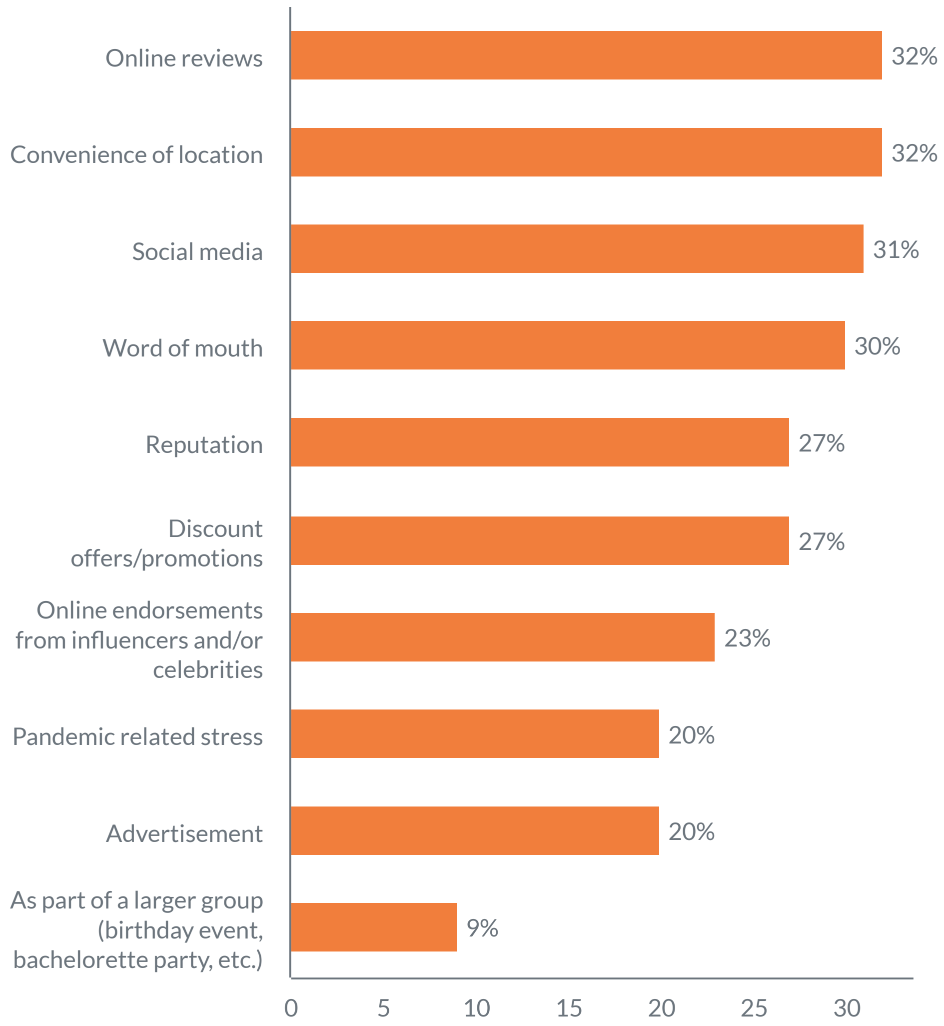
TOP INFLUENCES FOR CURRENT SPA-GOERS TO VISIT A SPA

42%

of current spa-goers said price was the biggest factor influencing decision.

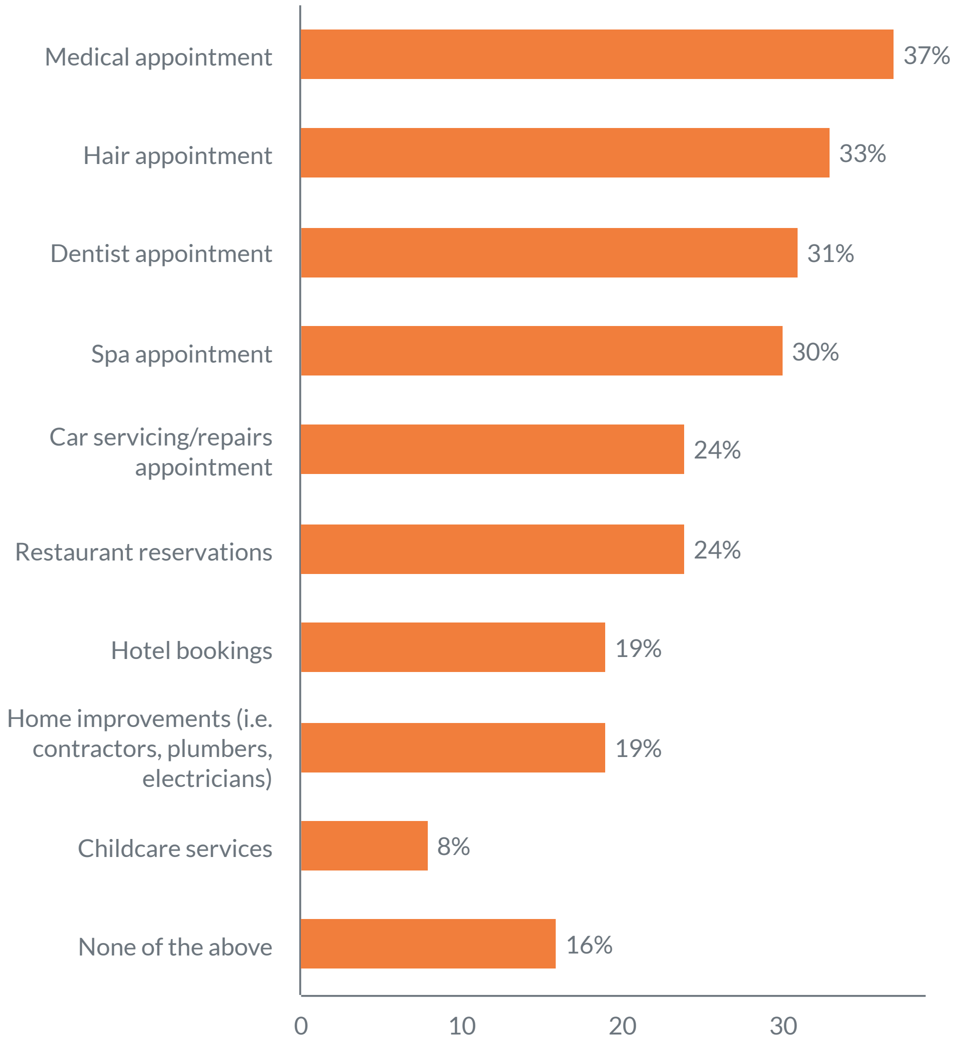
Gen X spa-goers are more likely to consider price when making a decision (48%) compared Gen Z (26%).

FACTORS INFLUENCING CURRENT SPA-GOERS TO VISIT A SPA



PENT-UP DEMAND... THE REAL LIFE PICTURE FOR CURRENT SPA-GOERS

ISSUES OR DELAYS WITH BOOKING SERVICES IN THE PAST THREE MONTHS



ISSUES FACED AT SPAS DEALING WITH THE BOTTLENECK

Unable to get the time slot I want for my treatment	**35%**
The price was beyond what I was prepared to pay	**31%**
Not able to get the day I wanted	**30%**
Not able to get my preferred therapist	**23%**
Not able to get the actual treatment I wanted	**23%**
None of the above	**19%**

Of those spa-goers who faced issues booking spa appointments, over 35% were unable to get the time slot they wanted. This was a particular issue for male spa-goers with 42% of their issues being down to time slots. They also tended to be more picky about getting their preferred therapist (27%).

More than half (55%) of high earners who had an issue booking a spa appointment were unable to get the time slot they wanted and 49% stated that the price was beyond what they wanted to pay.

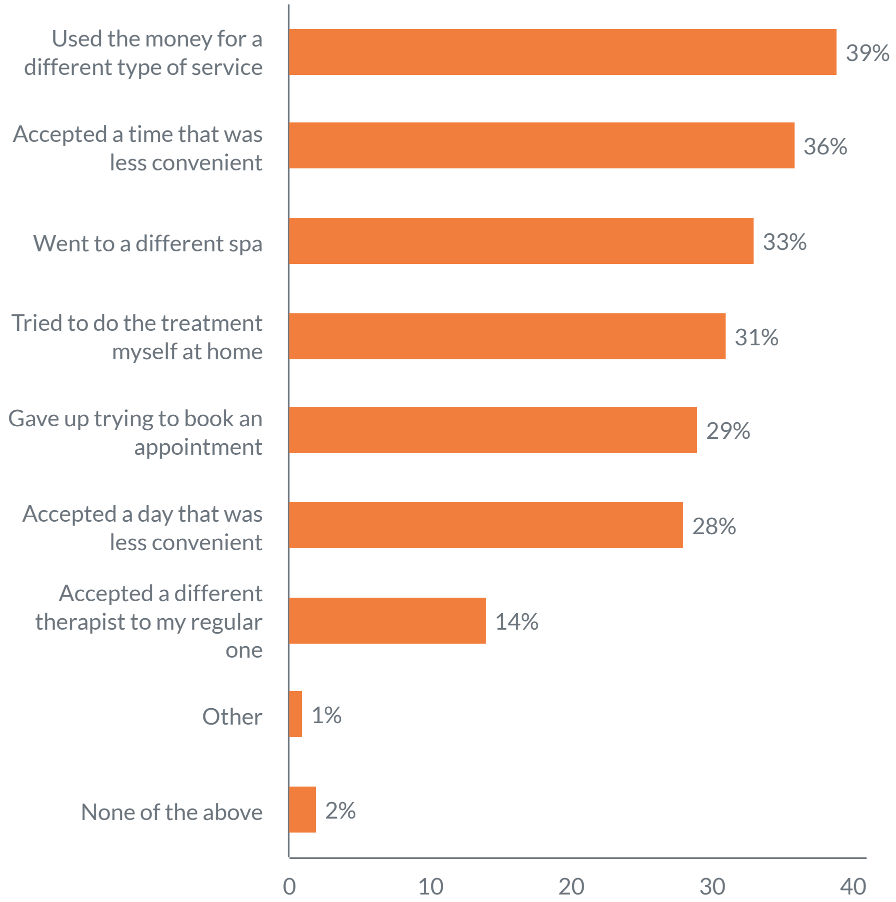
HOW CURRENT CUSTOMERS ARE REACTING

39%

of respondents who had booking issues used the money for different types of services or chose a less convenient time.

Fourteen percent of respondents are willing to accept a therapist other than their regular one when planning a spa visit..

WHAT CONSUMERS DID AS A RESULT OF EXPERIENCING AVAILABILITY ISSUES

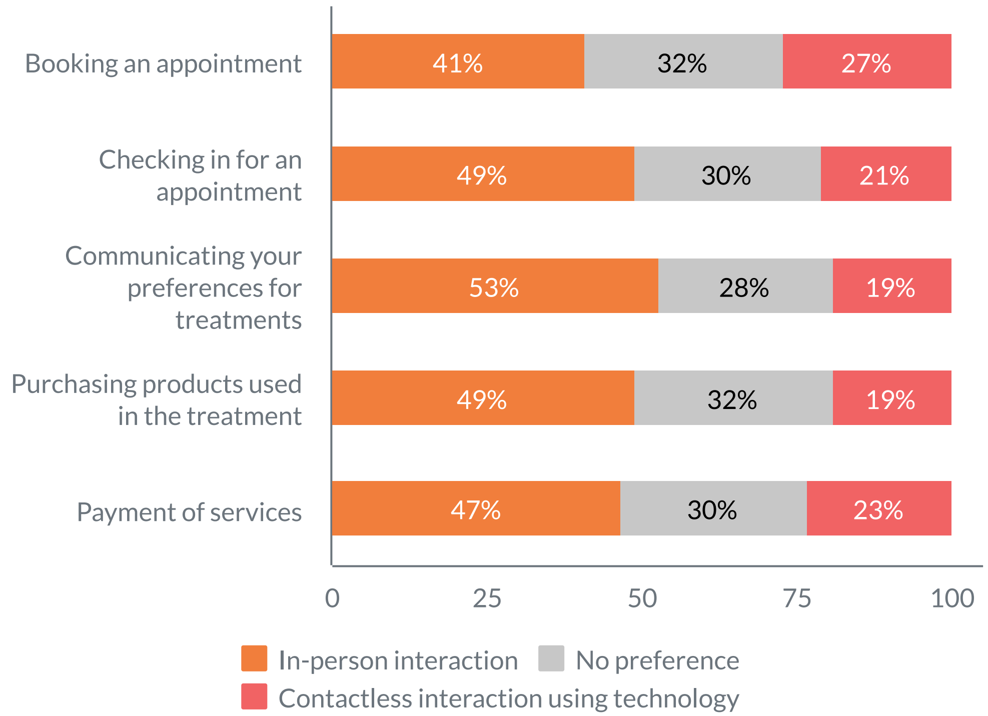


Higher income respondents are more likely to book on less convenient days (36%) compared to low income respondents (25%).

Higher income respondents were more likely to try the service at home (44%) compared to lower income (21%).

PEOPLE WANT TO RETURN TO PRE-PANDEMIC WAYS OF INTERACTION IN THE SPA ENVIRONMENT

INTERACTION PREFERENCES DURING SPA VISITS



High income respondents prefer contactless interactions with regards to purchasing products and paying for services.

Male spa-goers are more likely to prefer in-person interaction when it comes to booking an appointment and checking in.

HOW SPAS CAN ENCOURAGE VISITS

"Creating more schedules for appointments."

"Create packages to cover all health and wellness concerns."

"Spas could include an all inclusive whole body and mind treatment that lasts several hours."

"They could at least still have people come in with masks on."

"Make public their method of disinfecting between clients."

"That they have more flexibility with the appointment times and more able to suit my schedule."

LOOKING AHEAD

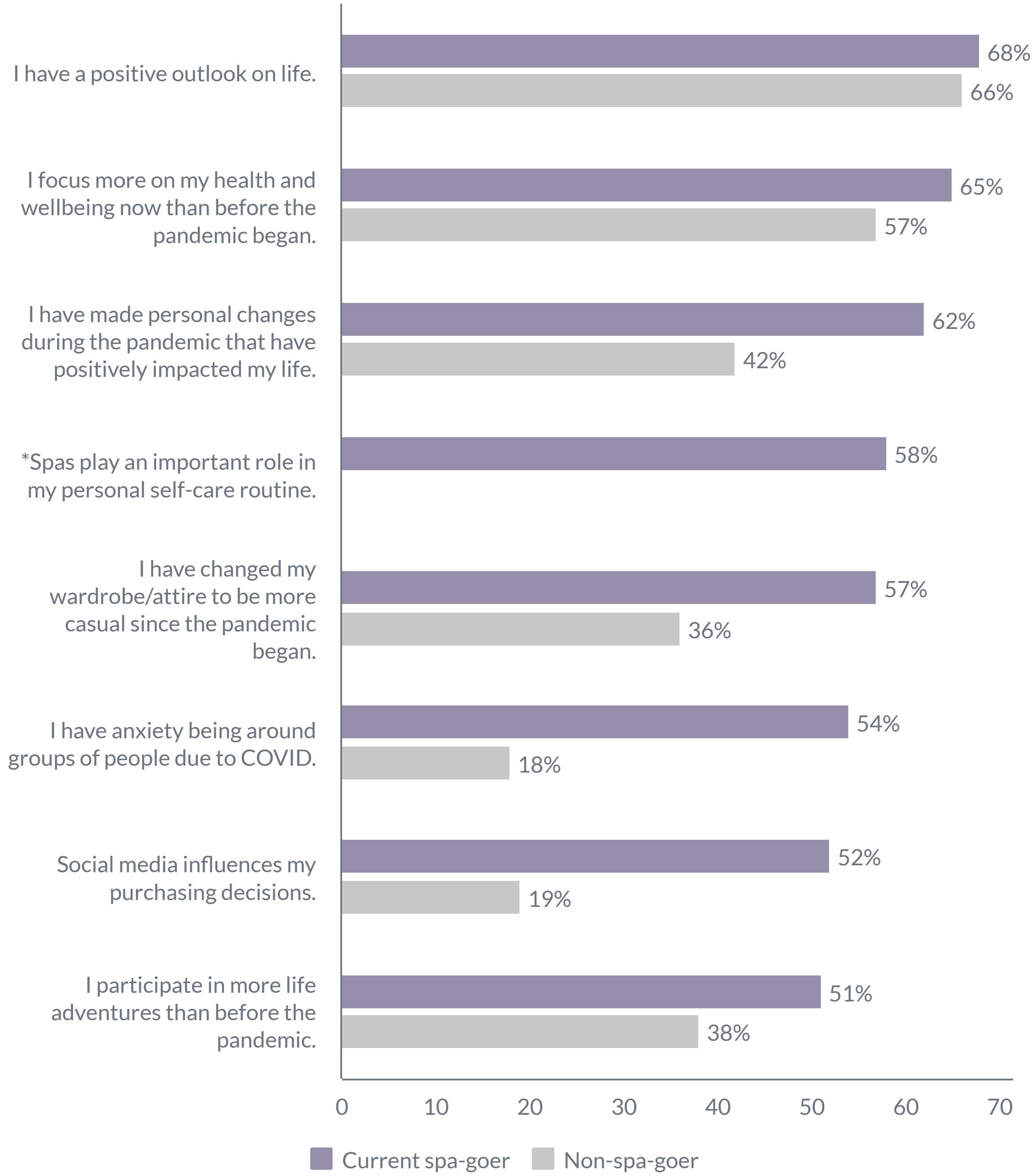
Overall, respondents have positive outlooks on life and the future, due in some part to the lifestyle adjustments they have made during the pandemic. Spa-goers, however, reported some interesting differences between themselves and their non-spa-goer counterparts.

For example, 68% of spa-goers and 66% of spa-goers agreed or strongly agreed that they have a positive outlook on life, but a significantly higher percentage of spa-goers (62%) reported making personal changes during the pandemic that positively impacted their lives, compared to 42% of non-spa-goers. Spa-goers (65%) were also likelier to agree that they are focusing on their health and well-being more than prior to the pandemic than non-spa-goers (57%).

Nearly six in 10 spa-goers (58%) said that spas play an important role in their personal self-care routines, with millennials (59%) and Generation X (60%) the likeliest to agree with that statement.

THE FUTURE LOOKS BRIGHT

Respondents felt they had a positive outlook on life (68%) and that they focus on their health and well-being more as a result of the pandemic.



SHOWING AGREE AND STRONGLY AGREE

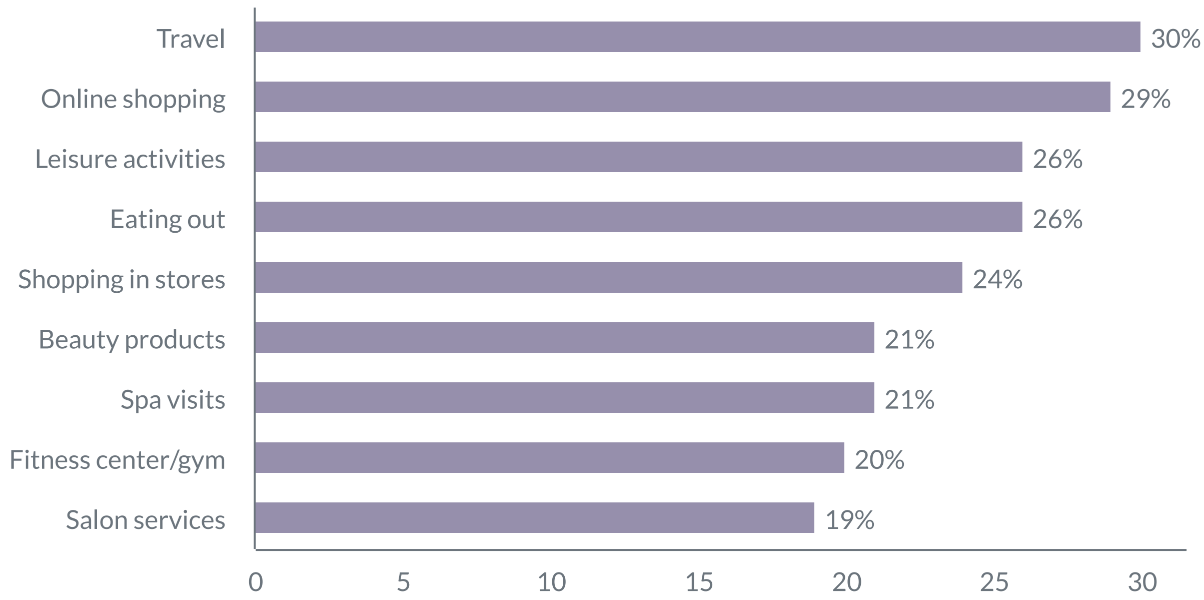
*Spa-goers only

Millennials (59%) and Gen X (60%) respondents are more likely to agree that spas play an important role in their personal self-care routine. High income earners also believe it is important (69%).

More than half (57%) of millennials agree that social media influences their purchasing decisions.

Travel is back at the top of respondents' agendas this year.

INCREASED EXPENDITURES EXPECTED OVER NEXT 12 MONTHS



INCREASED EXPENDITURES EXPECTED OVER NEXT 12 MONTHS

	CURRENT SPA-GOERS	NON-SPA-GOER	GEN Z	MILLENNIALS	GEN X	BABY BOOMERS
Travel	34%	23%	30%	36%	26%	27%
Online shopping	34%	17%	34%	35%	27%	22%
Leisure activities	31%	17%	22%	31%	25%	21%
Eating out	30%	17%	28%	30%	25%	19%
Shopping in stores	29%	14%	26%	30%	24%	16%
Beauty products	28%	7%	18%	30%	21%	10%
Spa visits	31%	0%	20%	28%	22%	9%
Fitness center/gym	29%	5%	24%	27%	21%	7%
Salon services	28%	4%	21%	25%	22%	8%

Millennials are most likely to spend more on services and experiences this year, especially when it comes to spa visits.

CONSUMER INSIGHTS

Large chain stores are largely the place consumers go to purchase their self-care products with the exception of CBD products (drugstore) and makeup (cosmetics retailer).

WHERE CONSUMERS MOST OFTEN BUY PRODUCTS

	LARGE CHAIN STORE	COSMETICS RETAILER	DRUGSTORE	IN SPA/ SALON	ONLINE RETAIL SITES	ONLINE DIRECT FROM SUPPLIER
Body Scrubs	49%	25%	28%	20%	24%	7%
Anti-aging skin care products	37%	30%	29%	22%	21%	7%
Moisturizers/ Serums	41%	27%	31%	17%	20%	6%
CBD products	27%	22%	32%	24%	23%	13%
Makeup	36%	38%	28%	21%	20%	7%
Nail polish	38%	29%	31%	24%	17%	6%
Aromatherapy/ candles/scents	45%	20%	22%	18%	24%	8%
Hair styling products	47%	25%	28%	18%	19%	6%
Vitamins/ supplements	44%	15%	37%	12%	22%	7%

SURVEY METHODOLOGY

This survey for Vol. XI of the Consumer Snapshot Initiative gathered responses from a total of 1,000 responses from a nationally representative sample of consumers in the U.S., in terms of age, gender, region and ethnicity. The survey was undertaken using a broadly representative sample, which ensured the study achieved responses from a comprehensive cross-section of the U.S. population. Responses were gathered from all 50 states and two territories from March 15 to March 23. 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 necessarily be expected to be in line with what spas report in terms of overall spa-going numbers or the 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.

The ISPA Foundation's objectives include being the educational source for the spa industry, establishing definitive research that validates spa industry-related topics and creating an endowment that sustains the ISPA Foundation in perpetuity.

The ISPA Foundation also wishes to thank the individuals and companies who have given generously and supported the annual ISPA Foundation Auction to make these research projects and the work of the Foundation possible.

ISPA® FOUNDATION