



ISPA Consumer Snapshot: Today's Spa-Goer

January 2024
PwC Research



Introduction

The International SPA Association (ISPA) Foundation commissioned PricewaterhouseCoopers (PwC) to conduct a nationally representative survey program to provide timely spa-goer insights relevant to the spa industry in the United States. For the purposes of this study, a “spa-goer” is defined as a person who has visited or attended a spa at least once in the last twelve months.



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01

Methodology and Demographics



Methodology

This wave of the ISPA Consumer Snapshot Initiative research focused on **spa-goers specifically**. To qualify for the survey, respondents had to have been to a spa in the past 12 months.

An online survey was distributed to **1,002 US spa-goers**, broadly representative in terms of age, gender, region and ethnicity. We gathered responses from **48 states**, and the survey was in field from the 5th December - 29th December 2023.

Any statistically significant differences by demographic profile are included throughout. Due to rounding, not all reporting percentages may equal 100%.

A look at today's spa-goers

70% are regular spa-goers
and have been to a spa at least 2 times
this year

45% of regular spa-goers are millennials
(aged 27-42)

58% of regular spa-goers have a
household income between \$50,000-
\$149,000

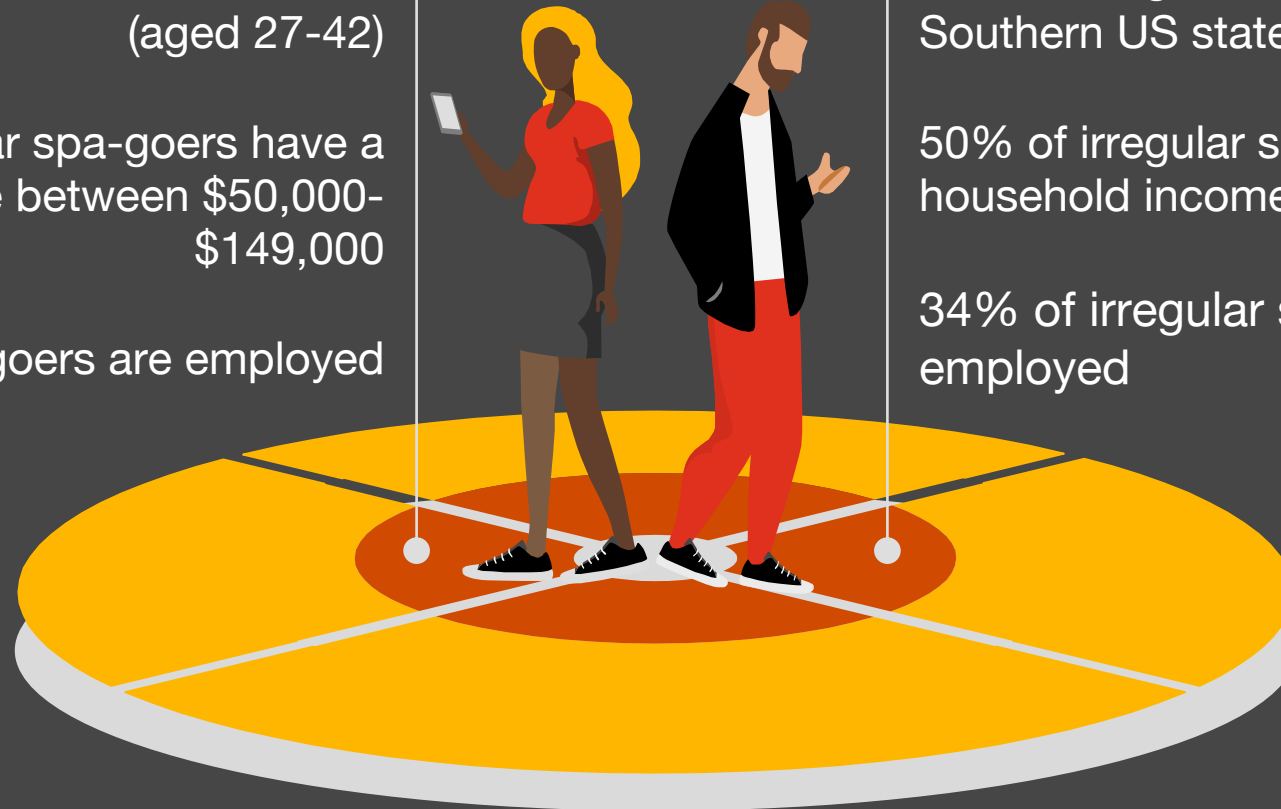
82% of regular spa-goers are employed

30% are irregular spa-goers
and have been to a spa only once this
year

48% of irregular spa-goers are from the
Southern US states

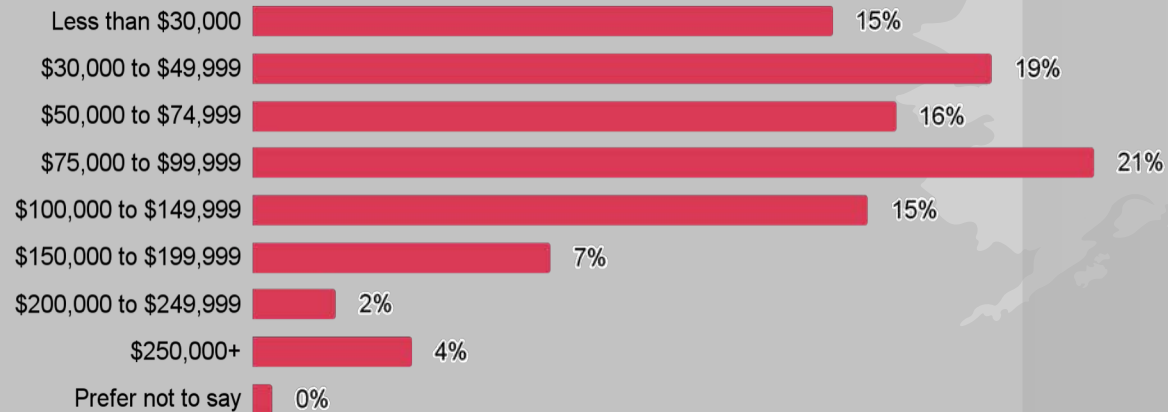
50% of irregular spa-goers have a
household income up to \$49,000

34% of irregular spa-goers are not
employed

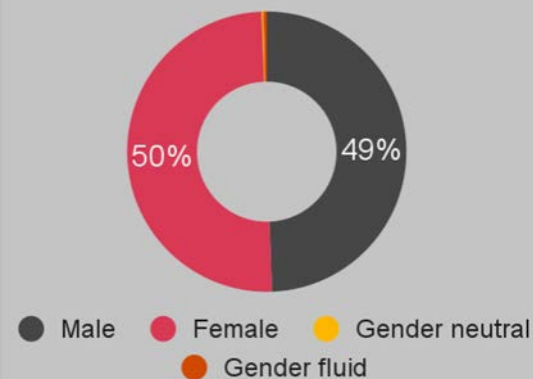


Who took part?

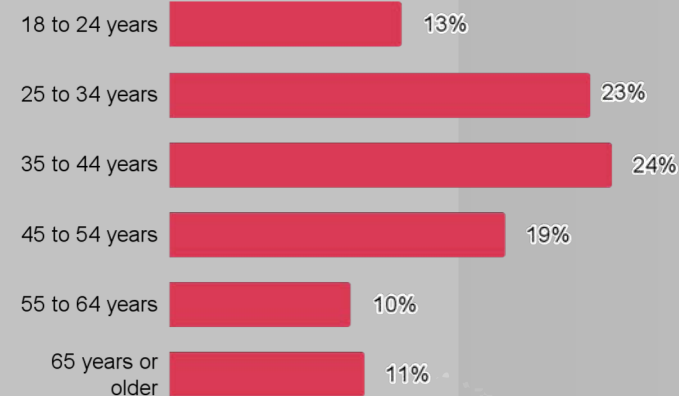
Household Income



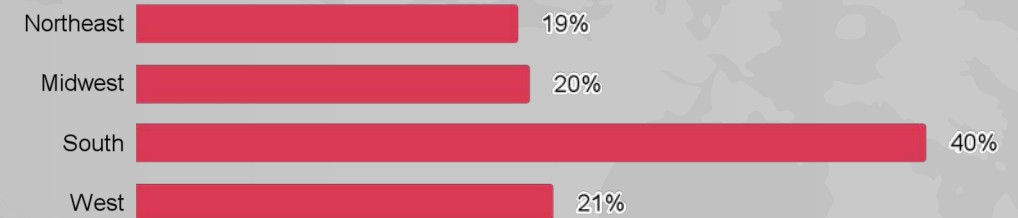
Gender



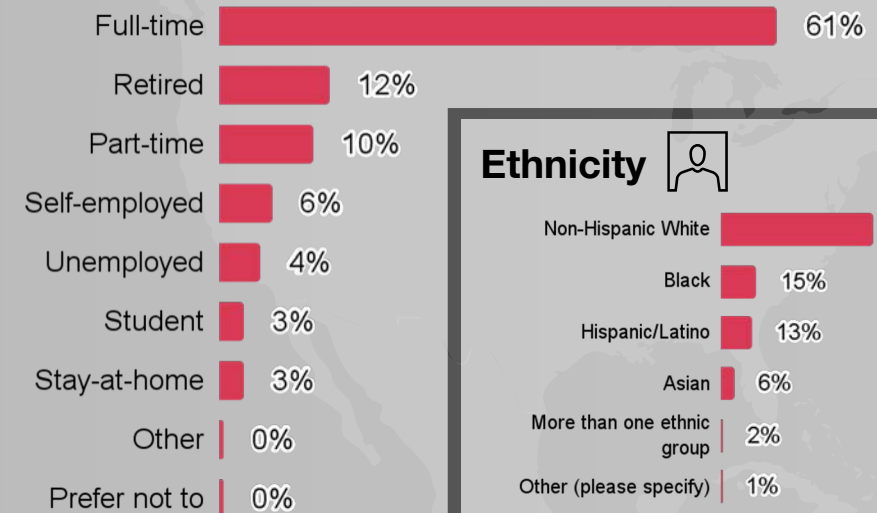
Age



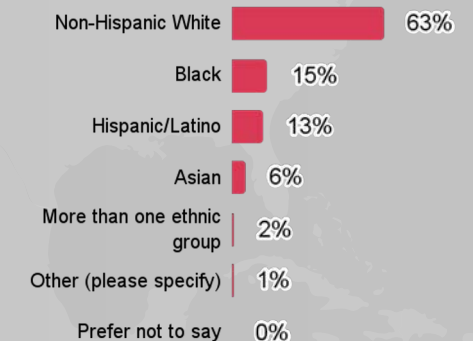
Region



Employment



Ethnicity



D1. Please indicate your gender. Base: All respondents (1,002) D2. Please indicate your age. Base: All respondents (1002) D3. Please indicate what state you live in. Base: All respondents (1002)

D4. Please indicate your ethnic group. Base: All respondents (1,002) D5. Please indicate your average gross annual household income before tax in U.S. dollars (\$). Base: All respondents (1,002) D6. What is your employment status? Base: All respondents (1,002)

02

Executive Summary



Four key things you need to know

1

Reducing stress and prioritising mental wellbeing is front of mind for spa-goers - how can spas capitalize?

As the prioritization of mental wellbeing gains prominence among spa-goers, spas have a unique opportunity to capitalize on this trend. A substantial 78% of spa-goers believe that investing in treatments improves their health and mental wellbeing. The commitment to mental health is evident, with 96% of spa-goers having taken proactive steps in the past 12 months, including 24% utilizing apps dedicated to managing mental wellbeing. Notably, 60% of spa-goers specifically seek spa experiences as a means to reduce stress. Understanding and tailoring offerings to align with these priorities can position spas as essential contributors to holistic health, meeting the evolving needs of spa-goers in their pursuit of mental and physical wellbeing.

2

Regular spa goers are spending more money - how can we encourage irregular spa-goers to spend similarly?

70% of spa-goers had been to a spa at least twice this year and have been defined as regular spa-goers. They are significantly more likely to spend more money whilst in the spa on treatments and spend money on in other wellness related facilities, such as gyms and beauty salons. They are also more inclined to adopt healthy lifestyles and see going to the spa as a long term commitment to their health and wellbeing. They have higher incomes than irregular spa-goers which gives them more flexibility to spend their money on discretionary activities and add them into their regular routines. Conversely, irregular spa-goers have lower incomes so are more likely to view going to the spa as a luxury or a treat. Across all spa-goers, there was a sentiment that spas are expensive and having deals or offers could encourage them to visit more frequently.

Four key things you need to know *(Continued)*

3

Payments and gratuity are an uncomfortable part of the spa-going experience.

In addressing the discomfort associated with payments and gratuity, there is a need for a nuanced approach by spas. The vast majority (73%) already feel comfortable with tipping and 64% always add gratuity on, even sometimes on top of automatic gratuity. However, the introduction of automatic gratuity presents challenges, as 26% express a negative impact on their experience. A notable 20% find pre-payment during booking rather than post-treatment unsettling. Perhaps most significantly, a substantial 58% find automatic gratuity frustrating. To enhance the overall spa experience, providers may consider flexible payment options, transparent communication about gratuity policies, and personalized approaches that align with diverse preferences, ultimately fostering a more positive and seamless transaction process for spa-goers.

4

Massage is the number one treatment, but medical, nail and facial services are also popular.

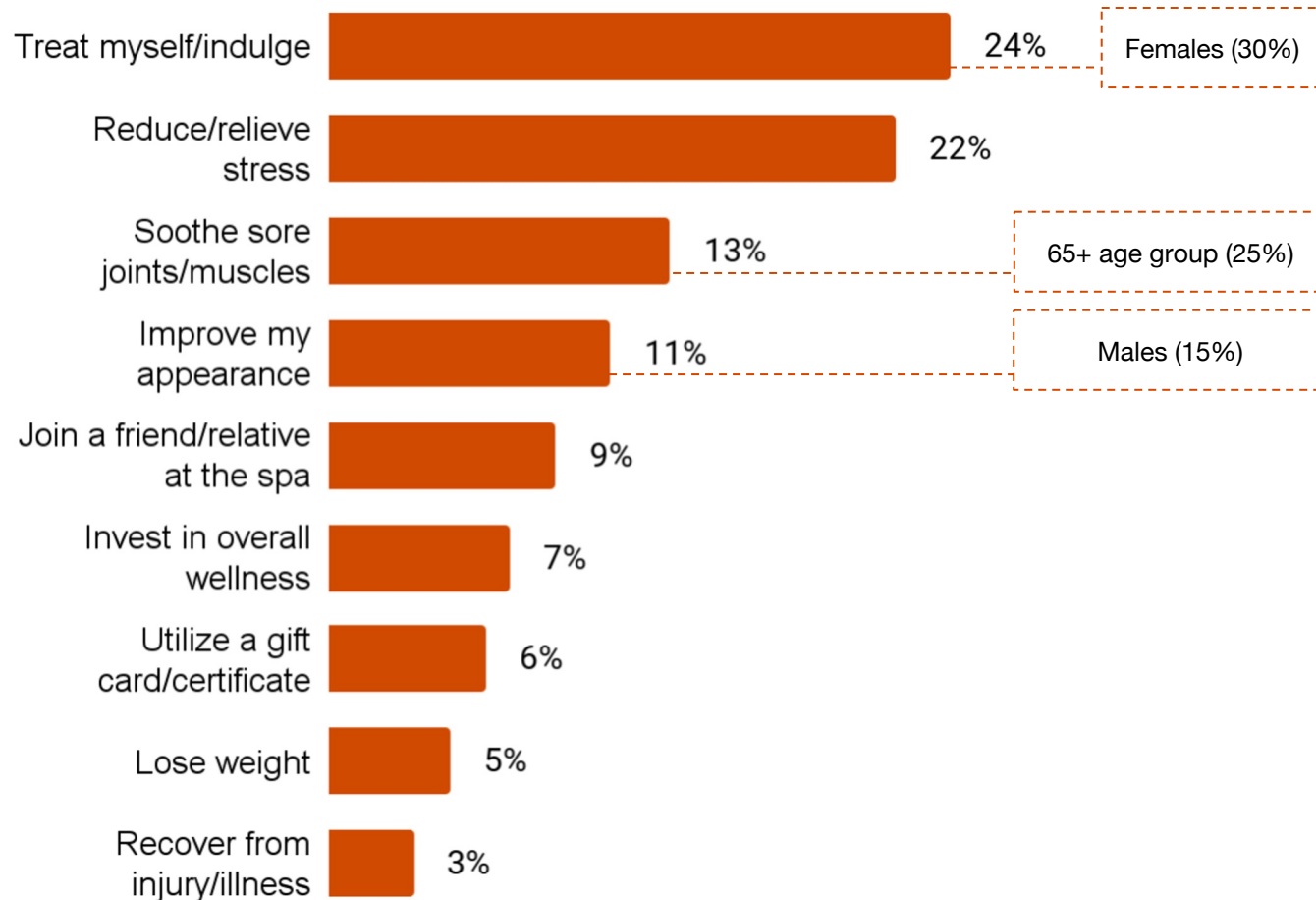
In the last 12 months, 73% of spa-goers in the US indulged in massage sessions. Nail treatments attracted 54% of the spa-going population, while facial treatments were preferred by 54%. Notably, 48% of spa-goers chose medical spas for their wellness experiences. Within the medical spa category, 41% opted for laser hair removal treatments, highlighting an interest in advanced skincare procedures. Additionally, a noteworthy third of medical spa visitors engaged in microdermabrasion, chemical peels or microneedling, suggesting an openness to non-invasive aesthetic procedures.

03

Spa Going Habits



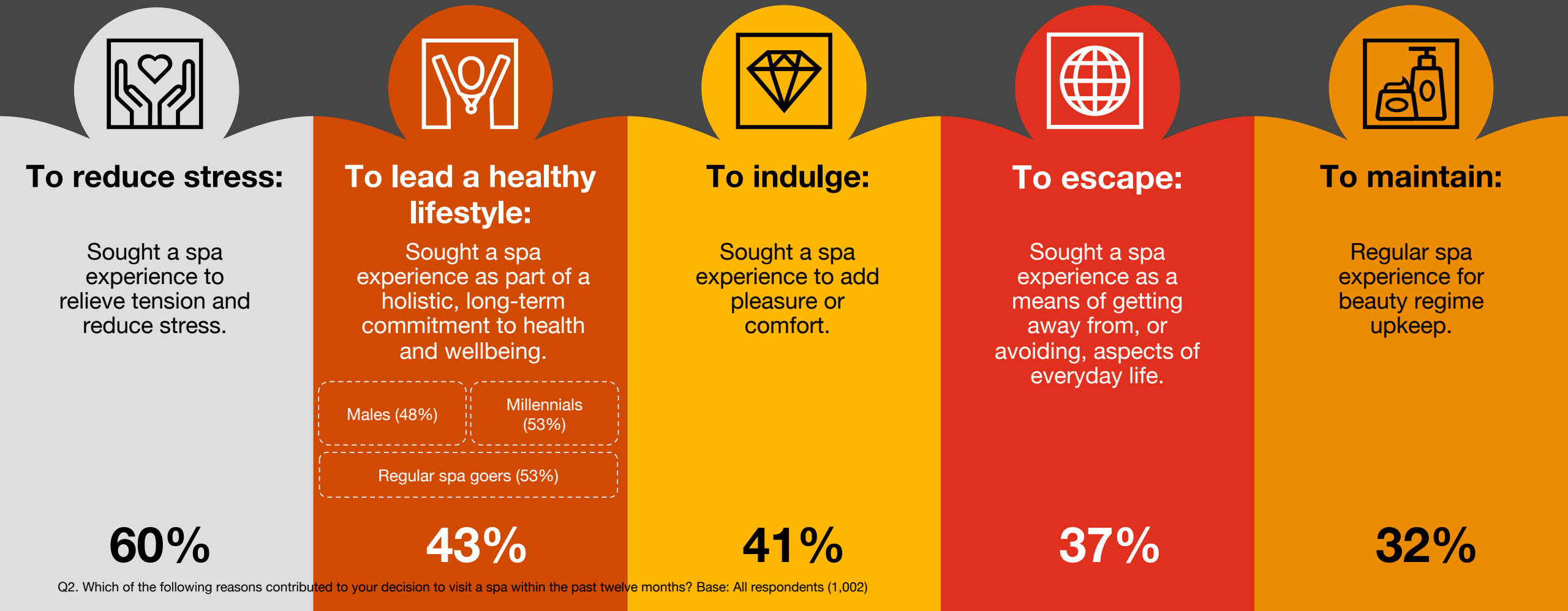
The majority of spa-goers list indulgence and stress relief as their primary motivation for their most recent spa trip.



24%

of spa-goers describe
'treating themselves' as their
primary reason to visit a spa

Looking over the past 12 months, reducing stress and wanting to lead a healthy lifestyle are the main reasons to visit a spa.



Q2. Which of the following reasons contributed to your decision to visit a spa within the past twelve months? Base: All respondents (1,002)

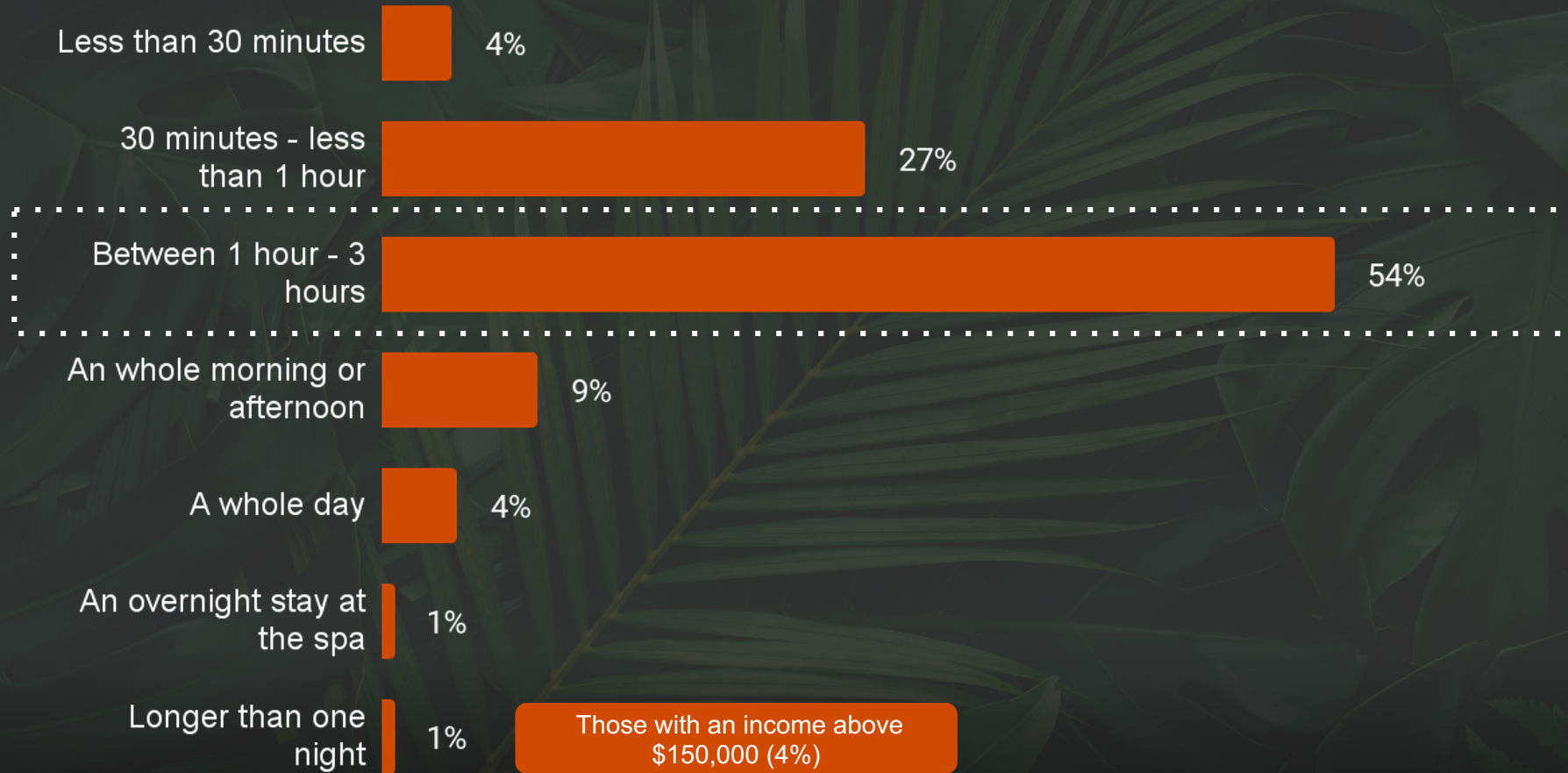
Over the past year, day spas were the most popular to visit, followed by hotel and resort spas.

| Type of spa | None | Once | 2-4 times | 5-7 times | 8-10 times | More than 10 times |
|---|------|------|-----------|-----------|------------|--------------------|
| Day Spa | 20% | 35% | 26% | 11% | 4% | 2% |
| Hotel/Resort Spa | 37% | 28% | 21% | 8% | 4% | 1% |
| Destination Spa/Wellness Resort | 45% | 25% | 18% | 6% | 4% | 1% |
| Club Spa | 50% | 17% | 17% | 8% | 4% | 2% |
| Medical Spa | 52% | 18% | 15% | 8% | 4% | 2% |
| Cruise Ship Spa | 60% | 16% | 12% | 6% | 4% | 1% |
| Mobile Spa | 62% | 14% | 11% | 6% | 3% | 2% |
| Airport Spa | 67% | 10% | 11% | 6% | 3% | 1% |
| Other including locally owned spas; casino spa; salon spas (nail/tanning) | 78% | 2% | 4% | 2% | 1% | 0% |

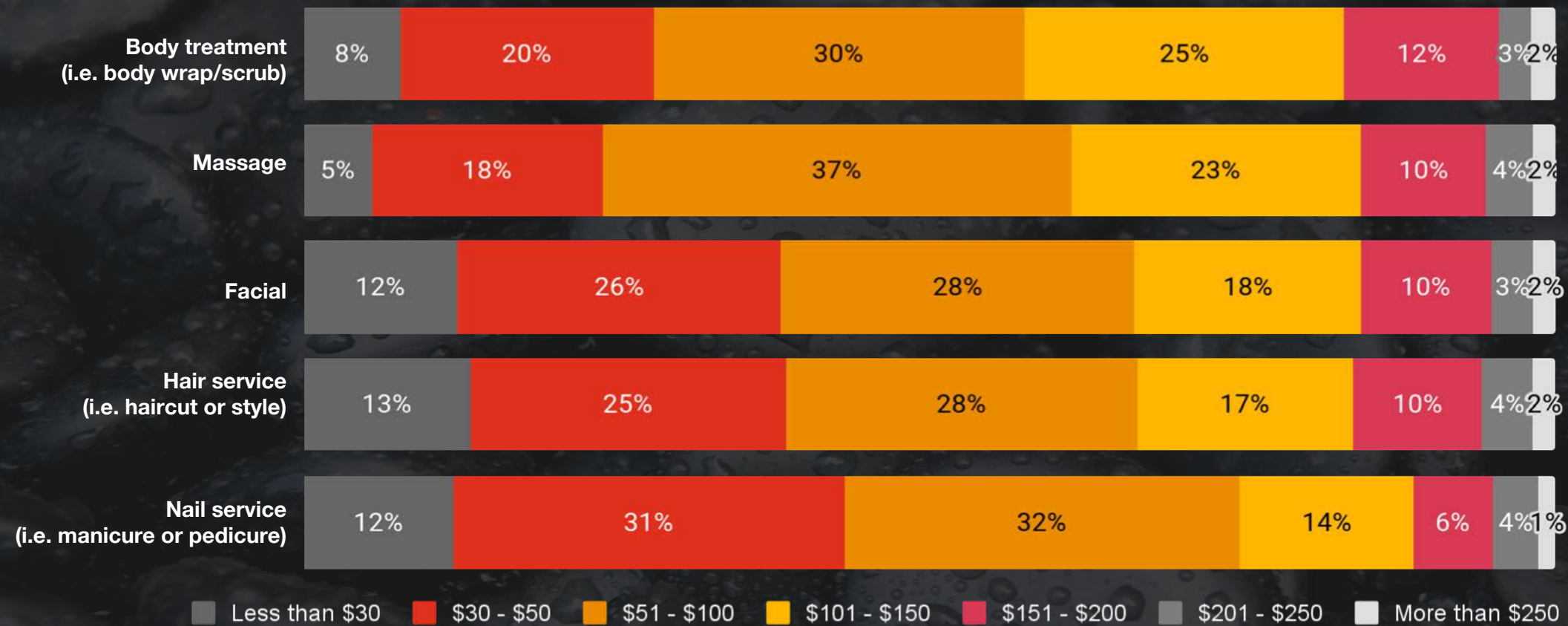
A massage was the most popular treatment among spa-goers followed by pedicures, facials and manicures.

| | In the last 12 months | More than 12 months ago | Never experienced this treatment | |
|---|-----------------------|-------------------------|----------------------------------|--|
| Massage | 73% | 19% | 8% | |
| Pedicure | 55% | 22% | 23% | 62% of females have had this treatment in the last 12 months |
| Facial | 54% | 23% | 24% | 61% of females have had this treatment in the last 12 months |
| Manicure | 53% | 22% | 24% | 67% of females have had this treatment in the last 12 months |
| Fitness or movement classes (i.e. aerobics, yoga, pilates etc.) | 46% | 25% | 29% | |
| Body scrub or wrap | 45% | 22% | 33% | |
| Mind/body experiences (i.e. guided meditations, reiki, chakra alignment etc.) | 42% | 24% | 34% | 47% of males have had this treatment in the past 12 months |
| Hydrotherapy treatment | 35% | 20% | 45% | 41% of males have had this treatment in the past 12 months |

Over half of spa-goers spent between 1 and 3 hours in the spa on their most recent visit.

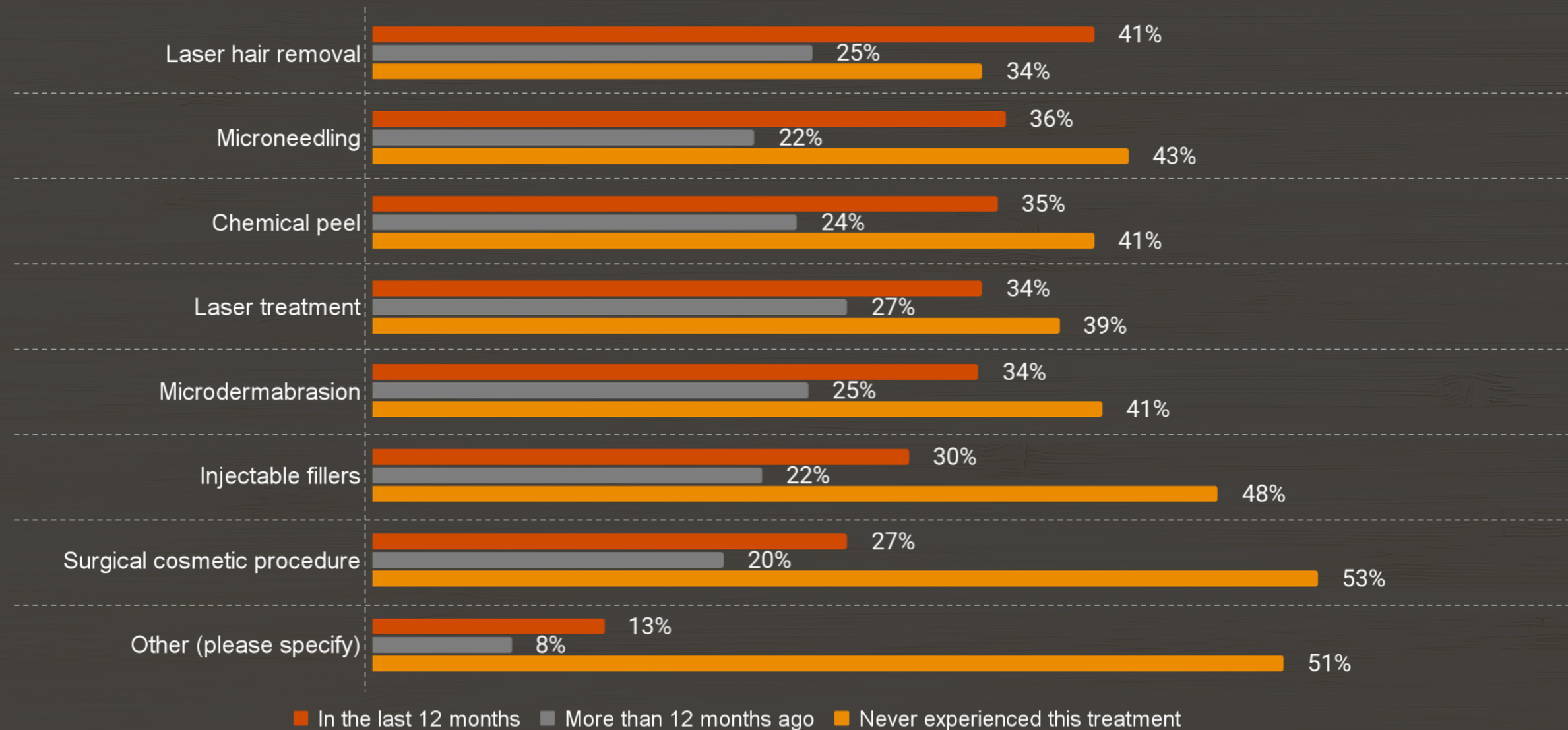


Spa-goers were more likely to spend at least \$100 on body treatments and \$100 or less on nail services.



Q6. Within the past twelve months, on average how much did you spend for each of the following types of services? (Nail service e.g. manicure or pedicure) Base: All respondents who had nail service(s) in the past 12 months (669)
Q6. Within the past twelve months, on average how much did you spend for each of the following types of services? (Massage) Base: All respondents who had massage(s) in the past 12 months (733)
Q6. Within the past twelve months, on average how much did you spend for each of the following types of services? (Hair service e.g. haircut or style) Base: All respondents who had hair service(s) in the past 12 months (832)
Q6. Within the past twelve months, on average how much did you spend for each of the following types of services? (Body treatment e.g. body wrap/scrub) Base: All respondents who had body treatment(s) in the past 12 months (455)
Q6. Within the past twelve months, on average how much did you spend for each of the following types of services? (Facial) Base: All respondents who had facial(s) in the past 12 months (538)

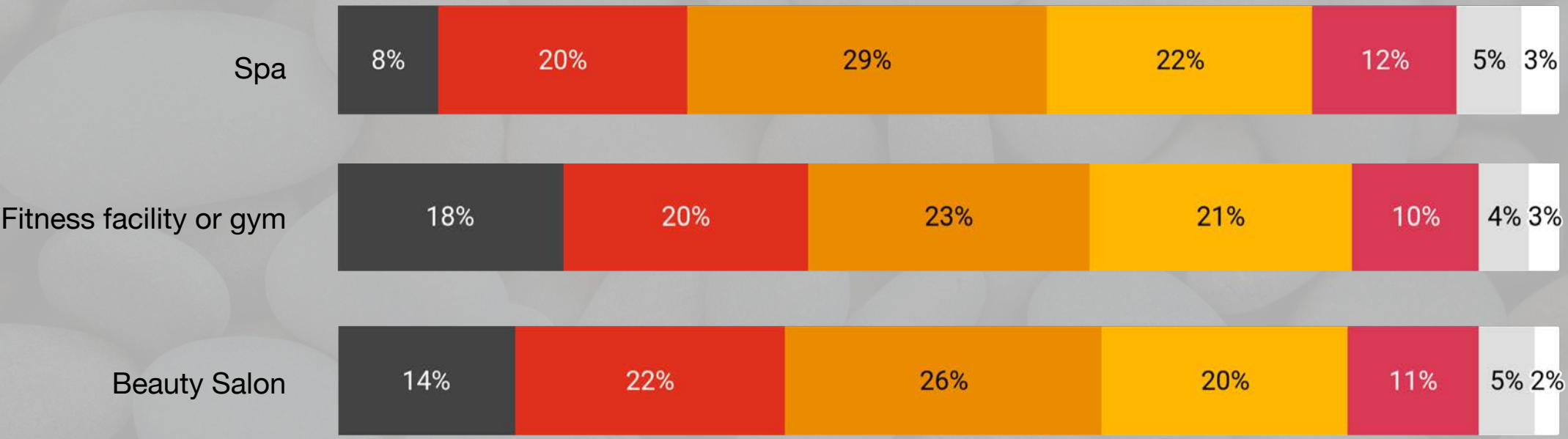
The three most popular medical spa treatments were laser hair removal, microneedling and chemical peels.



Q7. You indicated that you have visited a medical spa. Which of the following treatments have you experienced at a medical spa, and when? Base: All respondents who have visited a medical spa within the past 12 months (459)

Those who spend over \$200 are more likely to be regular spa-goers.

Amount of money spent in the past year:



□ Less than \$50 ■ \$50 - \$100 ■ \$101 - \$200 ■ \$201 - \$500 ■ \$501 - \$1,000
□ \$1,001 - \$1,500 ■ More than \$1,500

Q13. Approximately how much money have you spent in each of the following types of business over the past 12 months? Base: All respondents who spent money at a fitness facility or gym business (829)
Q13. Approximately how much money have you spent in each of the following types of business over the past 12 months? Base: All respondents who spent money at a beauty salon business (886)
Q13. Approximately how much money have you spent in each of the following types of business over the past 12 months? Base: All respondents who spent money at a spa business (973)

Those who do spend over \$200 are more likely to be regular spa-goers

Respondents spending above \$200:



Q13. Approximately how much money have you spent in each of the following types of business over the past 12 months? Base: All respondents who spent money at a fitness facility or gym business (829)

Q13. Approximately how much money have you spent in each of the following types of business over the past 12 months? Base: All respondents who spent money at a beauty salon business (886)

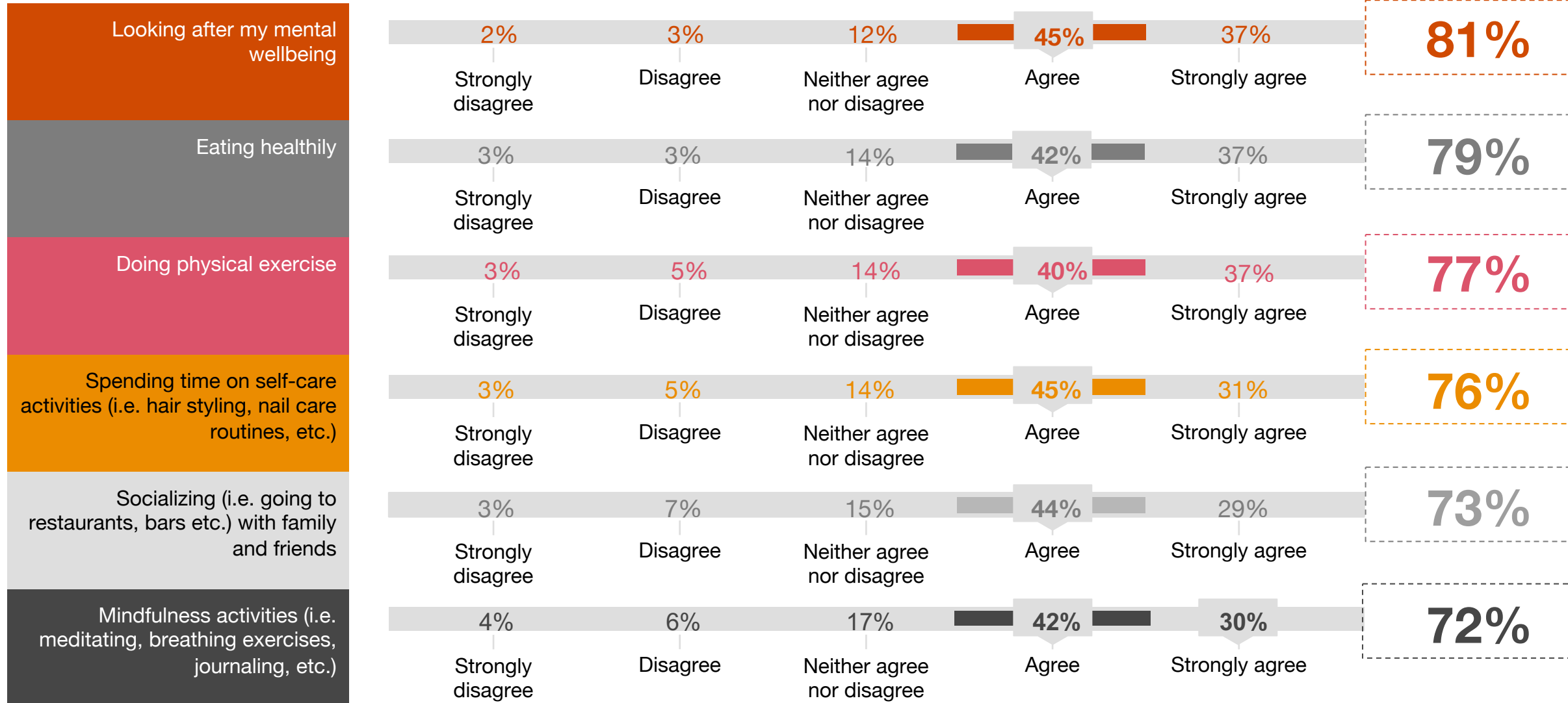
Q13. Approximately how much money have you spent in each of the following types of business over the past 12 months? Base: All respondents who spent money at a spa business (973)



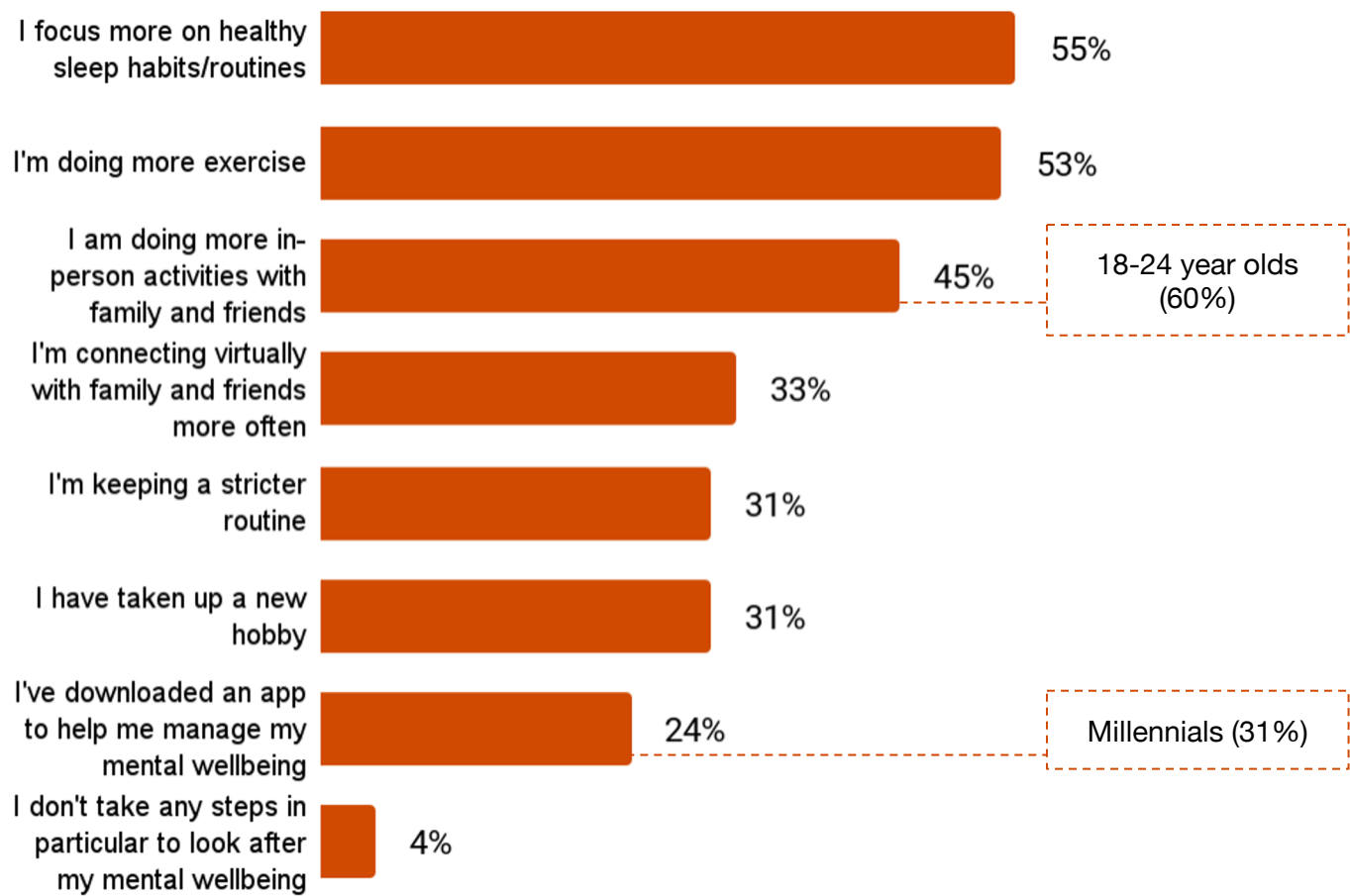
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Wellbeing

Around eight in ten agree that looking after mental wellbeing and eating healthily are an important part of the daily routine.



Nearly all have taken steps to improve their wellbeing, with focusing on sleep and routine being the most popular step.



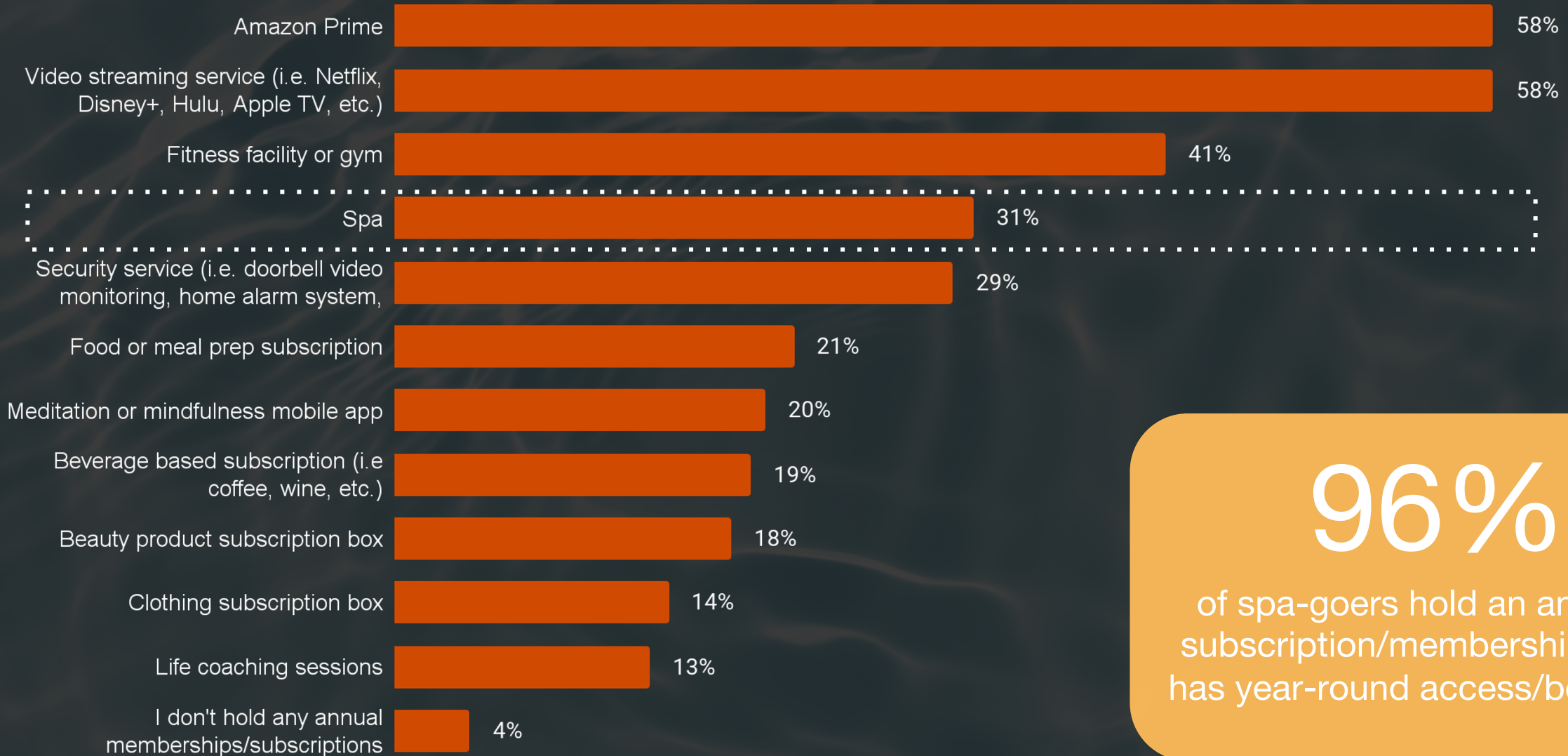
Q12. Which of the following steps have you taken in the last 12 months to look after your mental wellbeing? Base: All respondents (1,002)



96%

of spa-goers have taken steps to look after their mental wellbeing in the past 12 months

Almost all spa-goers hold some form of annual subscription, with nearly a third having an annual spa membership subscription.



96%

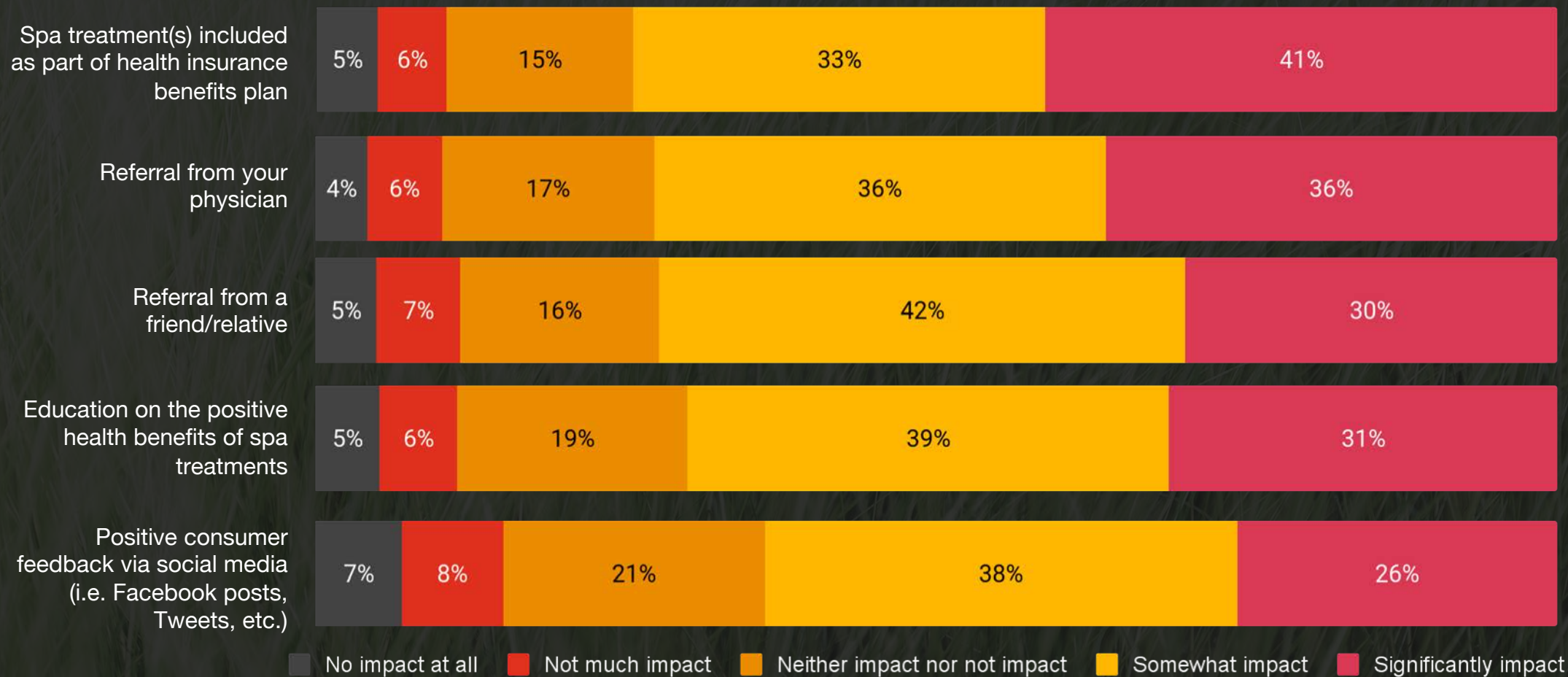
of spa-goers hold an annual subscription/membership that has year-round access/benefits

A woman with blonde hair tied in a bun is relaxing in a hot tub. She is lying on her back, with her arms resting on the edge of the tub. The water is dark and steamy. The background is dark and out of focus.

05

Spa Experience

Spa treatments being included in health insurance and referrals from physicians would significantly impact over two thirds of spa-goers to visit a spa in the future.



Q15. To what extent would the following impact your decision to visit a spa in the future? (Referral from a friend/relative) Base: All respondents excluding those who responded 'don't know' (986)

Q15. To what extent would the following impact your decision to visit a spa in the future? (Education on the positive health benefits of spa treatment(s)) Base: All respondents excluding those who responded 'don't know' (983)

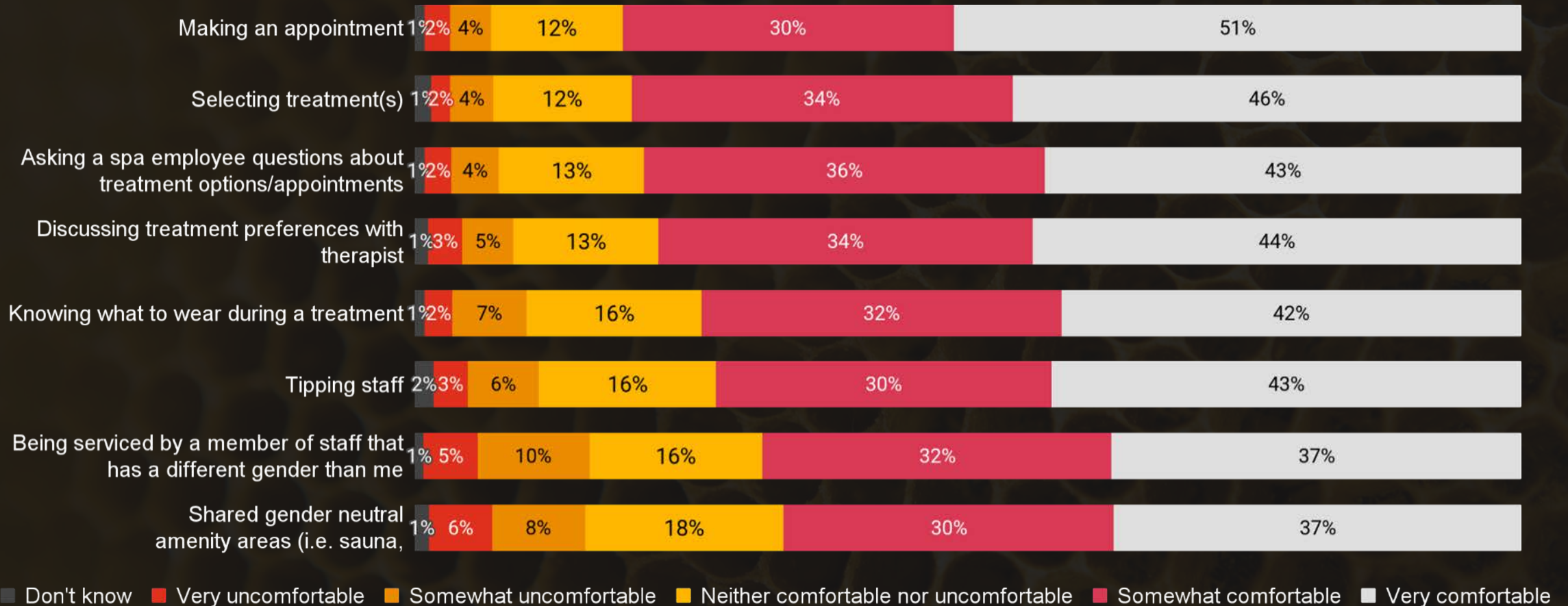
Q15. To what extent would the following impact your decision to visit a spa in the future? (Spa treatment(s) included as part of health insurance benefits plan) Base: All respondents excluding those who responded 'don't know' (992)

Q15. To what extent would the following impact your decision to visit a spa in the future? (Referral from your physician) Base: All respondents excluding those who responded 'don't know' (981)

Q15. To what extent would the following impact your decision to visit a spa in the future? (Positive consumer feedback via social media (i.e. Facebook posts, Tweets, etc.)) Base: All respondents excluding those who responded 'don't know' (987)

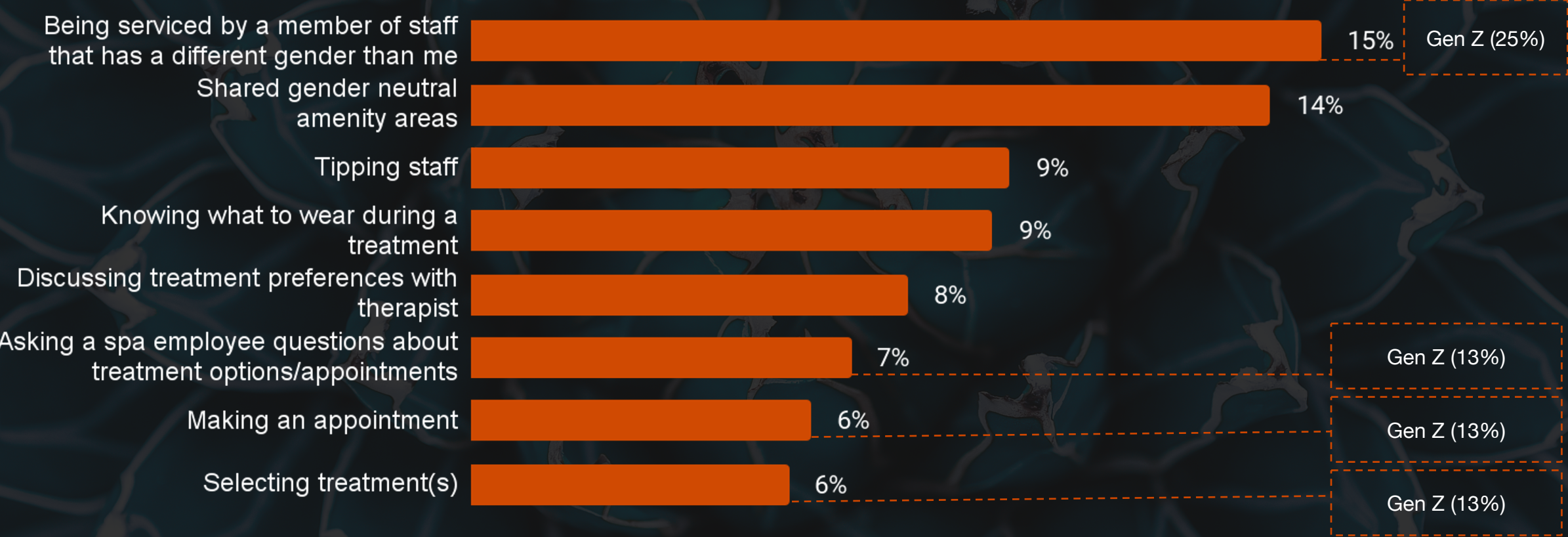
Tipping, being serviced by someone of a different gender and gender neutral areas show higher levels of discomfort when visiting a spa.

Respondent comfort levels with:

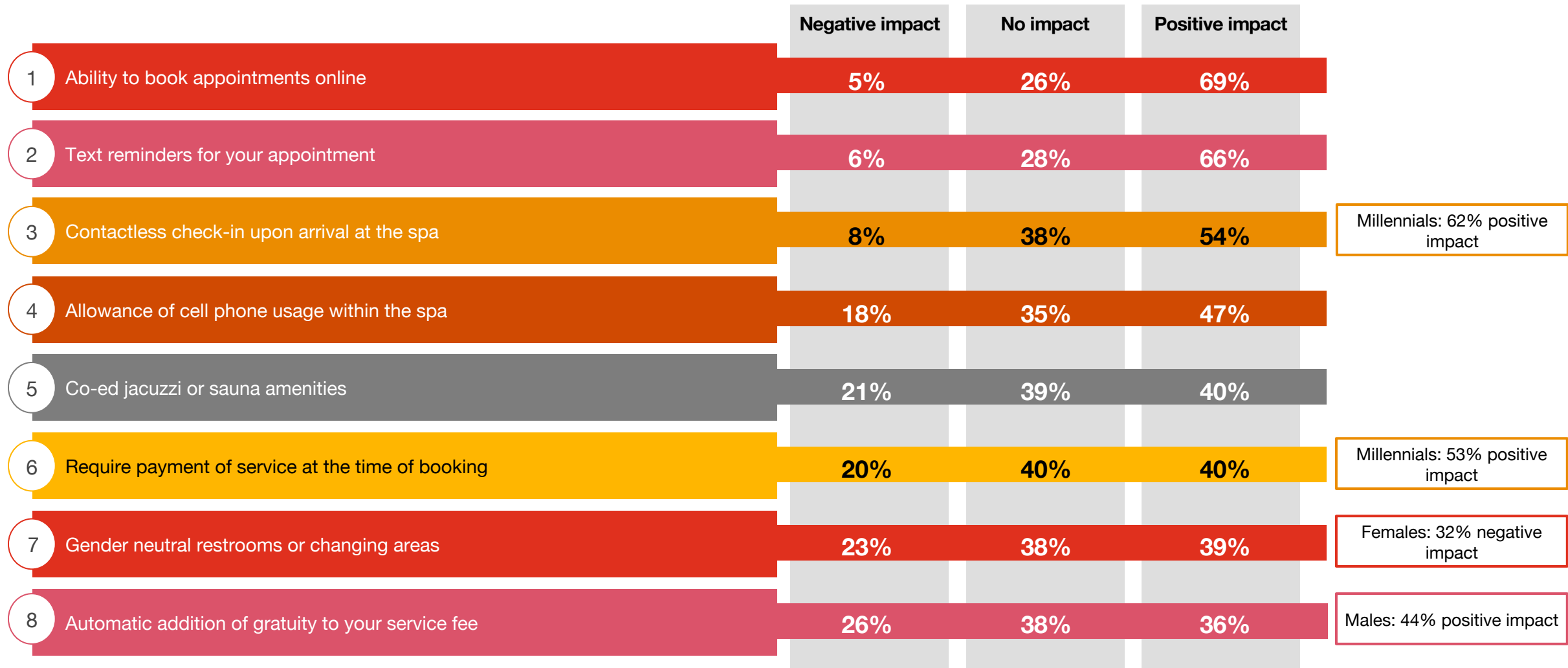


Gen Z are more likely to feel uncomfortable with certain aspects when visiting spas.

Very/somewhat uncomfortable:



The ability to book online and text reminders are considered to have a positive impact on the spa experience - less so for automatic gratuity and gender neutral spaces



Q17. What impact would each of the following services have on your overall guest experience if offered by a spa? Base: All respondents (1,002)

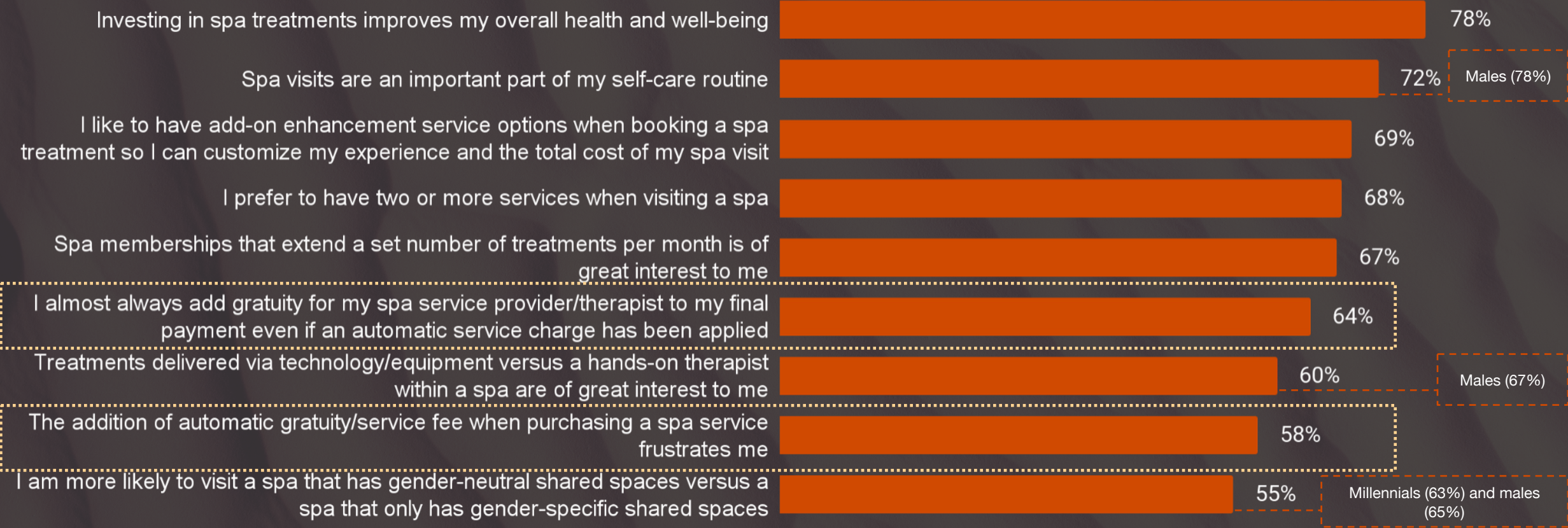
06

Looking Ahead



Whilst over half of spa goers find the automatic gratuity frustrating, over six in ten will still add their own tip on top of this.

Strongly/somewhat agree:



What do spa-goers want?

If spas want to encourage more frequent visits, they can consider the following strategies:

Offer an annual membership:

Providing an annual spa membership can encourage customers to keep coming back by offering access to a variety of treatments and services without the need to pay for each visit separately. Additionally, the reminder of a recurring payment could encourage members to visit more frequently.

Bonding sessions:

Spas are now widely seen as a **place one can hang out**, and more people are visiting spas in groups. Friends and family usually make the sessions lively, offering the perfect avenue for interaction while receiving treatment. This social aspect can motivate people to visit the spa regularly.

What do spa-goers want? *(Continued)*

If spas want to encourage more frequent visits, they can consider the following strategies:

Seasonal offers:

Driving business during slow periods with **seasonal offers** can also be an effective strategy. Offering special promotions during off-peak times can incentivize customers to visit the spa more often.

Affordable pricing:

Asian spas are often **more affordable than luxury places**, making them more accessible and encouraging more frequent visits. These strategies can help spas create a welcoming and engaging environment that encourages customers to visit more often.

What do spa-goers want?

DEALS

*'Maybe offer **deals or coupons**. It will make me feel less guilty for spending on myself'*

Female, 35-44 years old

*'Offer **family packages**. And **referral packages** that would be lovely like 40 percent off your next visit for each referral'*

Female, 25-34 years old

*'If spas could offer more **discount rates** for the services'*

Female, 35-44 years old

*'Maybe a punch card system where you get punched after a certain amount of spa treatments and after that maybe the **next one 50% off**'*

Female, 65 years or older

*'Offer **couple discounts** or days for couples in the month that make it available to have staff that can work multiple people'*

Male, 35-44 years old

*'**Combine treatments or bundle** to save money or have promotions of services especially when you bring a friend, have a **referral program**'*

Female, 35-44 years old

*'Offer **more specials and deals** the price is high but it is worth it. More promotions would bring me in at least two times more a year'*

Male, 25-34 years old

*'Better package deals would make the experience much more enjoyable. Being able to **bundle different treatments** for the same price instead of what's advertised'*

Male, 45-54 years old

FOOD

*'They can have **extra fruit amenities** because I love **eating healthy**'*

Male, 35-44 years old

*'Possibly add **free snacks**'*

Male, 18-24 years old

*'Serve you a little **something to eat** if your visit is for several services'*

Female, 65 years or older

*'I would love to get nice **food or have a snack bar**'*

Male, 25-34 years old

*'The spa center offers membership services that include adding a complimentary service with each visit, **providing fruits and beverages, as well as meals**. These additional amenities would make me enjoy going to the spa center even more.'*

Female, 25-34 years old

PERSONAL EXPERIENCE

*'Sometimes I feel a little bit rushed when I'm at the spa, I would like to be able to enjoy it at my **own pace**'*

Male, 65 years or older

*'To **tailor more or learn about my individual needs** as a customer so I can have a better experience'*

Male, 25-34 years old

*'Providing **customized and personalized services** according to my preferences'*

Female, 35-44 years old

*'Have options for us to have our **own music**'*

Male, 45-54 years old

What do spa-goers want?

LOWER PRICES

'[Be] less expensive'

Female, 55-64 years old

'Not be so expensive and don't force a tip. Tip culture is out of control and has caused me not to leave tips at all'

Female, 45-54 years old

'I would love to go more often, and the only way I can do that is if services are more affordable'

Female, 45-54 years old

'Have more services that are inexpensive and not charge so much'

Female, 18-24 years old

'Lower costs, run frequent promotions'

Female, 45-54 years old

EDUCATION

'Encourage to have more mindfulness. Also it would be enjoyable if they taught their skills to the person or had classes you could go to.'

Something fun like, making your own face mask or something tonight extent'

Female, 18-24 years old

'In depth explanation of what all treatments do and their benefits. As well as the ability to look at reviews and pictures of the facilities'

Male, 18-24 years old

'One thing spas could do to encourage me to visit more would be provide more advertisement and information on its benefits!'

Male, 25-34 years old

APPOINTMENTS

'Quickly treat common conditions with 24/7 video visits and messaging with a clinician. Upfront pricing. No appointments, and no insurance needed'

Male, 55-64 years old

'For one have more near by location. Offer walk-in and appointment by phone and/ or also by online appointment. Avoid adding additional fee. Offer different payment options'

Female, 35-44 years old

'Perhaps have 24 hours open because I work nights and it'd be nice to to go you know at 2:00 in the morning or something like that'

Female, 45-54 years old

'Abolish tipping like they do in Europe and include adequate staff wages in the price of the treatment. Ensure massage therapists and estheticians have extensive and thorough training on the service but also sanitation best practices. Ensure the treatment starts on time and add in something extra as an unexpected perk'

Female, 45-54 years old

About the ISPA 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.

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