



# ISPA Consumer Snapshot Study

January 2025  
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 12 months.

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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# 01

## Methodology and Demographics



# Methodology

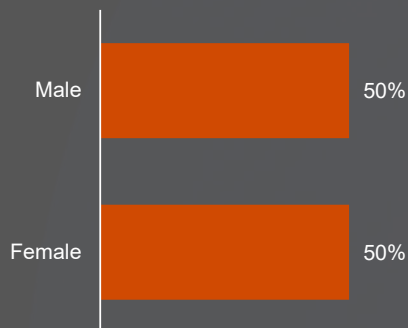
This year the Consumer Snapshot study focused on **both spa-goers and non-spa-goers**. To qualify as a spa-goer, respondents had to visit a spa at least once within the past 12 months.

An online survey was distributed to **1,000 US respondents**, broadly representative of the US population in terms of age, gender, region and ethnicity. We gathered responses from **49 states/districts**, and the survey was in field from December 9 – 20, 2024.

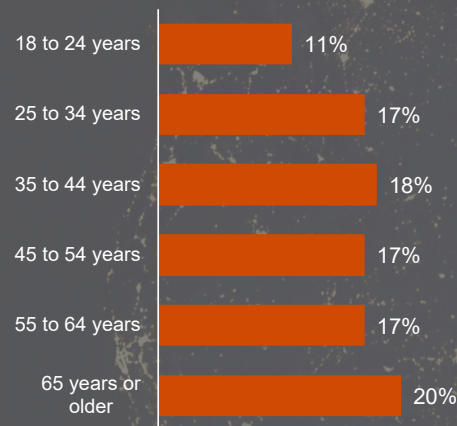
Any statistically significant differences by demographic profile are included throughout. Due to rounding, not all reporting percentages may equal 100%.

# Who took part?

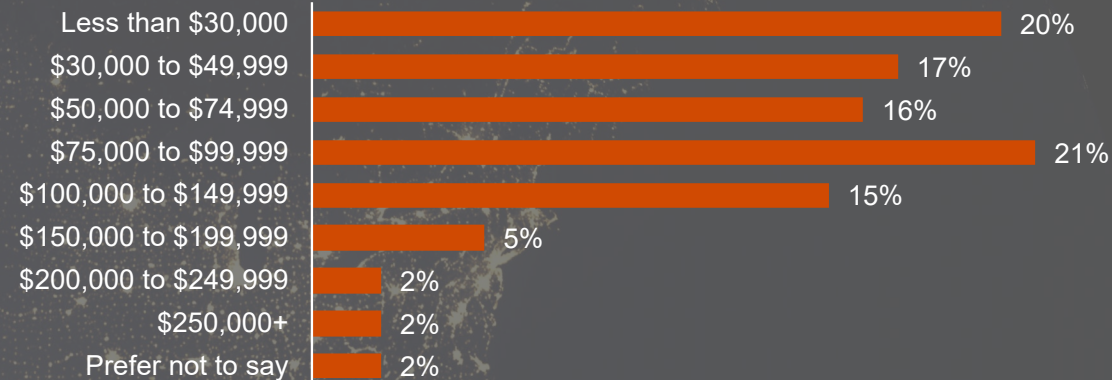
## Gender



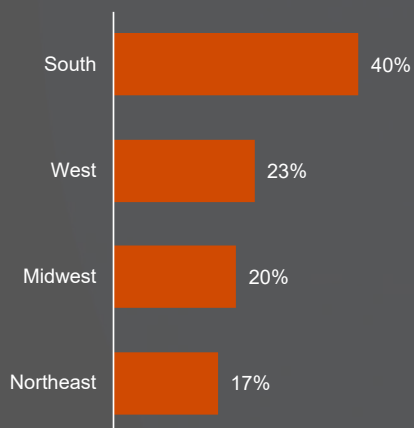
## Age



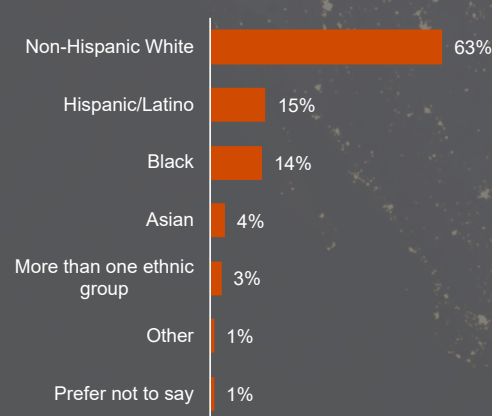
## Household Income



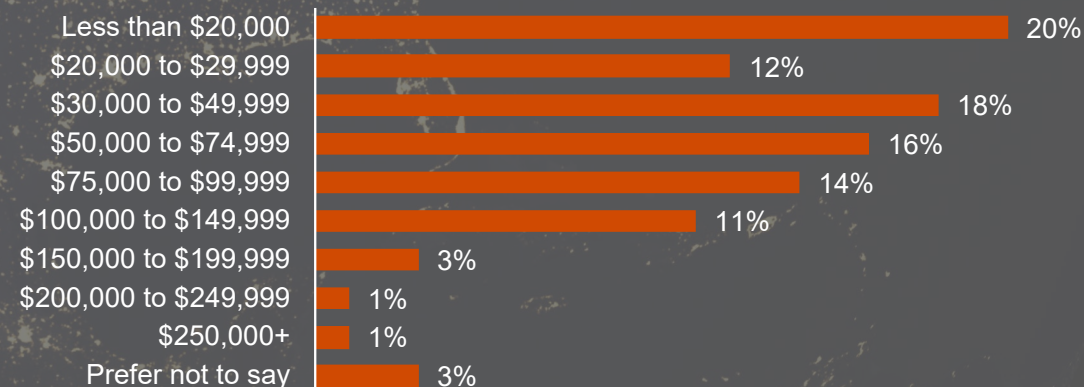
## Region



## Ethnicity



## Personal Income



D1. Please indicate your gender. Base: All respondents (1000) D2. Please indicate your age. Base: All respondents (1000) D3. Please indicate the state you live in. Base: All respondents (1000)

D4. Please indicate your ethnic group. Base: All respondents (1000) D5. Please indicate your average gross annual household income before tax in U.S. dollars (\$). Base: All respondents (1000)

D6. Please indicate your average gross annual individual/personal income before tax in U.S. dollars (\$). Base: All respondents (1000)

The background of the slide is a photograph of a swimming pool. A chain-link fence runs diagonally across the frame, separating the pool deck from the water. The pool water is a clear, light blue. In the bottom right corner, a portion of a circular pool drain is visible. A solid red rectangle is positioned in the lower-left area of the slide, containing the text 'Executive Summary'.

# 02

Executive Summary

# Executive Summary

1

## **Prioritizing self-care, indulgence and reducing stress are still key areas of focus for spa-goers**

- 85% of spa-goers agree that visiting a spa is a self-care activity.
- Almost two-thirds of spa goers indicated that reducing stress contributed to their decision to visit a spa in the past 12 months with almost half stating indulgence.
- Spas that tailor offerings to align with these priorities can position themselves as essential contributors to holistic health, meeting the evolving needs of spa-goers in their pursuit of mental and physical wellbeing.

2

## **Opportunities exist amongst non-spa-goers**

- Over three-fifths of non-spa-goers would be most interested in trying a massage, with half interested in fitness/movement classes.
- Gen Z non-spa-goers are more interested in modern treatments such as halotherapy (55% interested), laser hair removal (48% interested) and injectable fillers (26% interested).
- While cost is the top reason to influence non-spa-goers to visit a spa or to do so more often, spa cleanliness was ranked as the second reason (40% ranked it in their top three influences) and quality of the therapists and service providers was ranked as the third reason (35% ranked it in their top three influences).
- Comms which provide reassurance on the things that matter, such as cleanliness and quality of therapists could help address the concerns of non-spa-goers. Targeting and marketing non-spa-goers with specific offerings could encourage them to visit a spa or to do so more often.

# Executive Summary

## **Rewards programs, gender-neutral spaces and particular complimentary offerings are more likely to appeal to males**

3

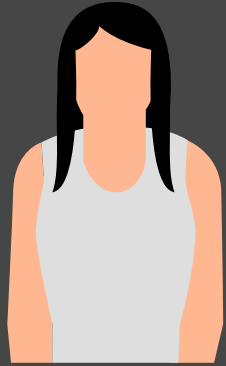
- 22% of male spa-goers are more likely to state rewards programs with incentives for repeat services/visits as having an influence on their decision to visit a spa.
- 10% of male non-spa-goers are more likely to state gender-neutral inclusivity and policies as having an influence on their decision to visit a spa or to do so more often.
- Males are also more influenced to visit a spa by certain complimentary amenities. 71% of males would be influenced by hot tubs, 66% influenced by steam rooms, 64% influenced by gym/fitness equipment and 38% influenced by cold plunge pools.
- Tailoring offerings to the male spa-goer could help encourage footfall amongst this group.

4

## **There is a 50/50 split with regards to the use of technology within the spa setting, however spa-goers, medium-income households, and 25–44-year-olds show more interest**

- 40% seek new experiences to try that involve cutting edge technology, but 33% are more traditionalists.
- 40% feel that AI can improve their life in many ways, but 37% have no interest in using technologies/devices that use AI.
- Approximately half of respondents are interested in trying infrared saunas (52% interested), flotation therapy (50% interested) and 25–44-year-olds therapy (49% interested).
- Spa goers, medium-income households, and 25–44-year-olds show more interest in offerings with innovative technology.
- There is an opportunity to offer cutting-edge treatments using technology within the spa offering alongside more traditional treatments, particularly amongst the younger, middle income and regular spa-goer groups.

# Spa-goers are more likely to be younger, have higher incomes, be more influenced by complimentary amenities and be more open to technology



## Spa-Goer

### Visited a spa at least once in the past 12 months

- More likely to be aged **18-44 years**
- More likely to have gross annual **household income of \$75,000-\$149,999**
- Complimentary amenities have more of an influence on their decision to visit a spa
- More interested in innovative technologies being incorporated into the spa offering
- More open with regards to technology/AI



## Non-Spa-Goer

### Not visited a spa in the past 12 months

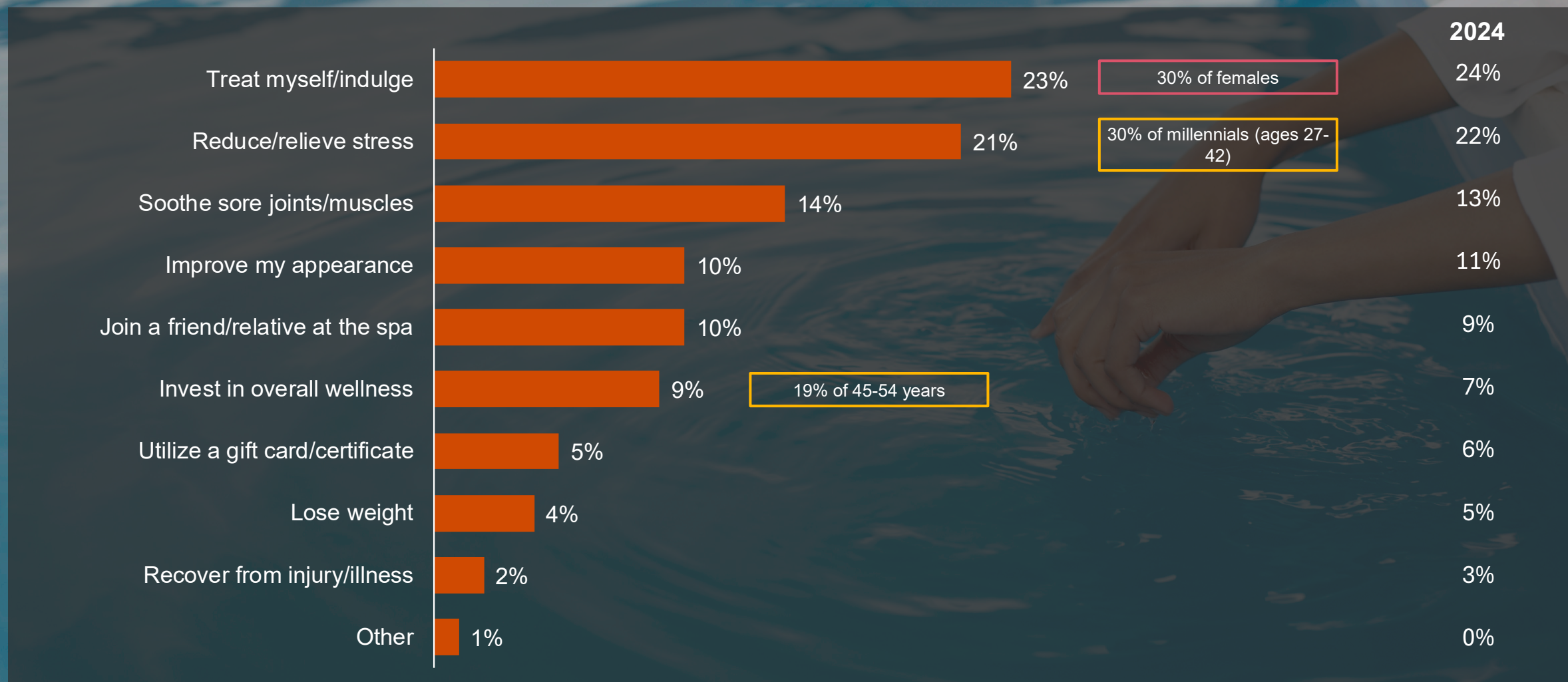
- More likely to be aged **55 years or older**
- More likely to have gross annual **household income of less than \$50,000**
- Complimentary amenities would not have an influence on their decision to visit a spa
- Less interested in innovative technologies being incorporated into the spa offerings
- More traditional with regards to technology/AI

# 03

## Spa Experience



# Primary motivation for spa-goers most recent spa trip



Q1. Which of the following best describes the primary reason for your most recent trip to a spa? Base: All spa-goers (414)

# Main reasons for visiting a spa in the past twelve months



## To reduce stress

Sought a spa experience to relieve tension and reduce stress.

**64%**



## To indulge

Sought a spa experience to add pleasure or comfort.

**46%**



## To escape

Sought a spa experience as a means of getting away from, or avoiding, aspects of everyday life.

**40%**



## To lead a healthy lifestyle

Sought a spa experience as part of a holistic, long-term commitment to health and wellbeing.

**39%**



## To maintain

Regular spa experience for beauty regime upkeep.

**31%**

**2024**

**60%**

**41%**

**37%**

**43%**

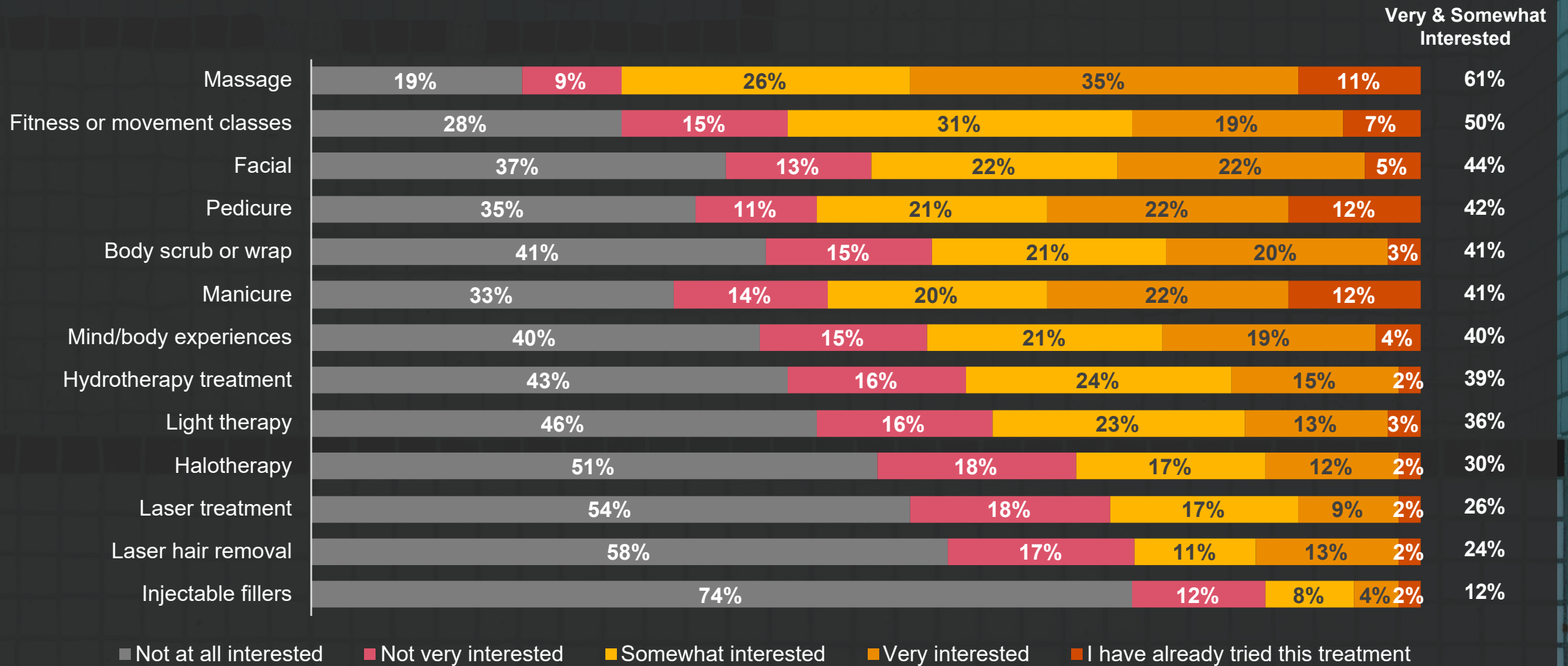
**32%**

# Treatments Spa-Goers Experienced in the Past 12 Months

	In the last 12 months	More than 12 months ago	Never experienced this treatment
Massage	73%	20%	7%
Manicure	58%	21%	21%
Pedicure	58%	20%	22%
Facial	54%	22%	24%
Fitness or movement classes	52%	27%	21%
Body scrub or wrap	42%	24%	35%
Mind/body experiences	37%	26%	37%
Light therapy	32%	19%	50%
Hydrotherapy treatment	31%	18%	51%
Halotherapy	25%	16%	59%
Laser hair removal	25%	16%	60%
Injectable fillers	19%	12%	69%
Laser treatment	17%	18%	65%

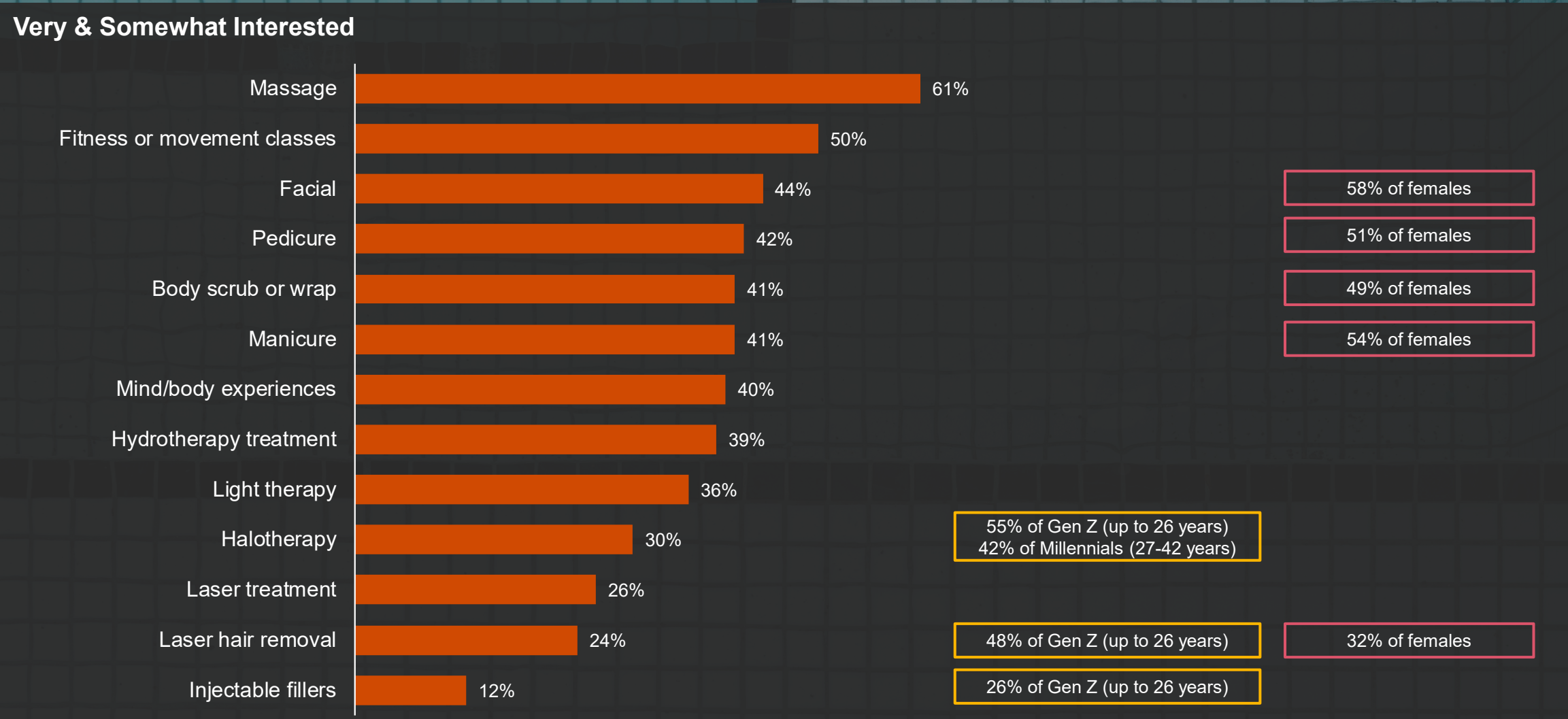
Females are more likely to have had a **manicure** (72%), **pedicure** (73%) and **facial** (61%) in the last 12 months

# Non-Spa-Goers Level of Interest in Trying Treatments

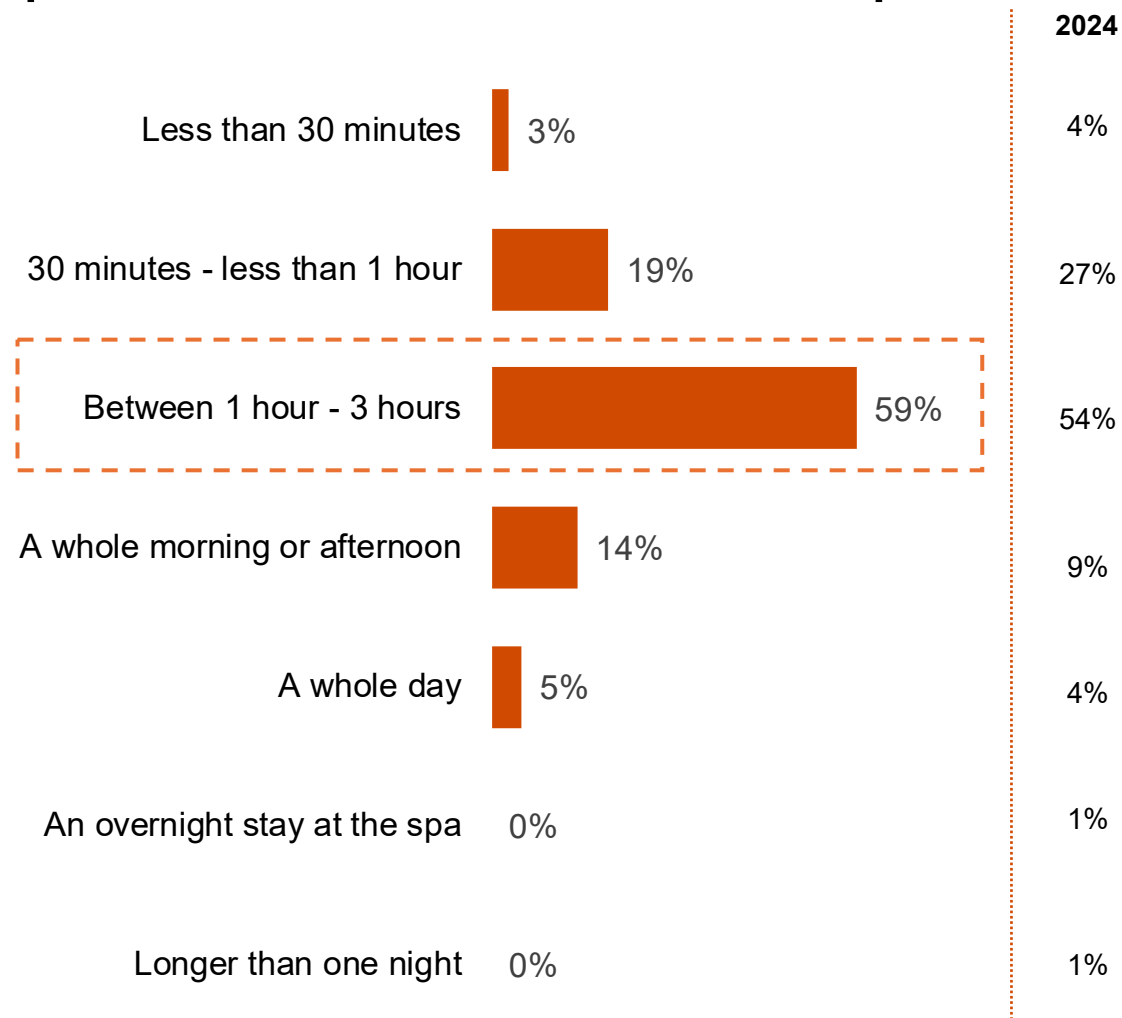


Q4. Please rate your level of interest in trying the following treatments. Base: All non-spa goers (586)

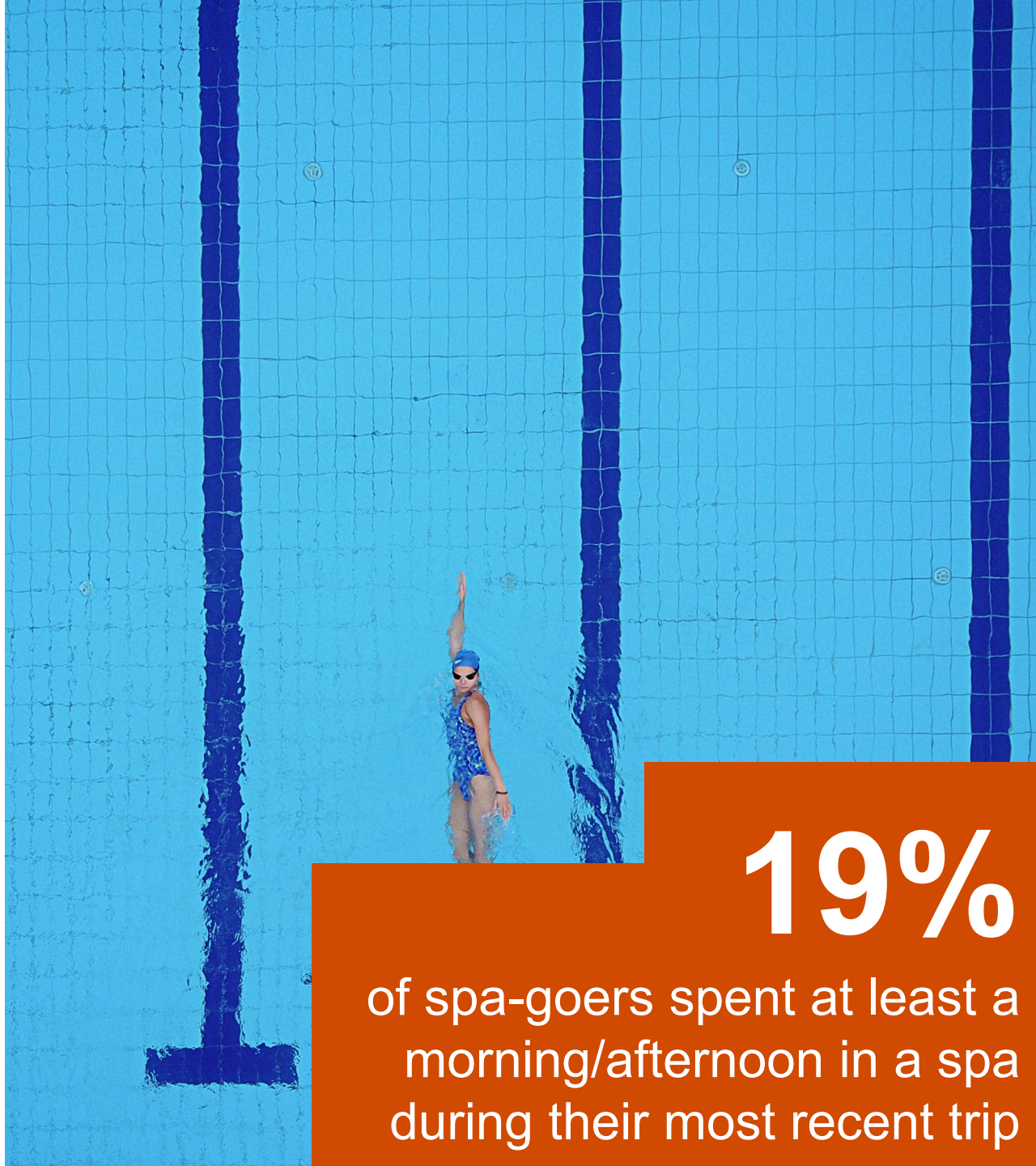
Female non-spa-goers show higher levels of interest in facials, pedicures, body scrubs/wraps, manicures and laser hair removal and Gen Z non-spa-goers are more interested in halotherapy, laser hair removal and injectable fillers



# Over half of spa-goers spent between one and three hours at the spa on their most recent trip



Q5. Thinking about your most recent trip to a spa, approximately how much time did you spend there? Base: All spa-goers (414)



19%  
of spa-goers spent at least a morning/afternoon in a spa during their most recent trip

# Attributes that Influence Spa-Goers Decision Making the Most



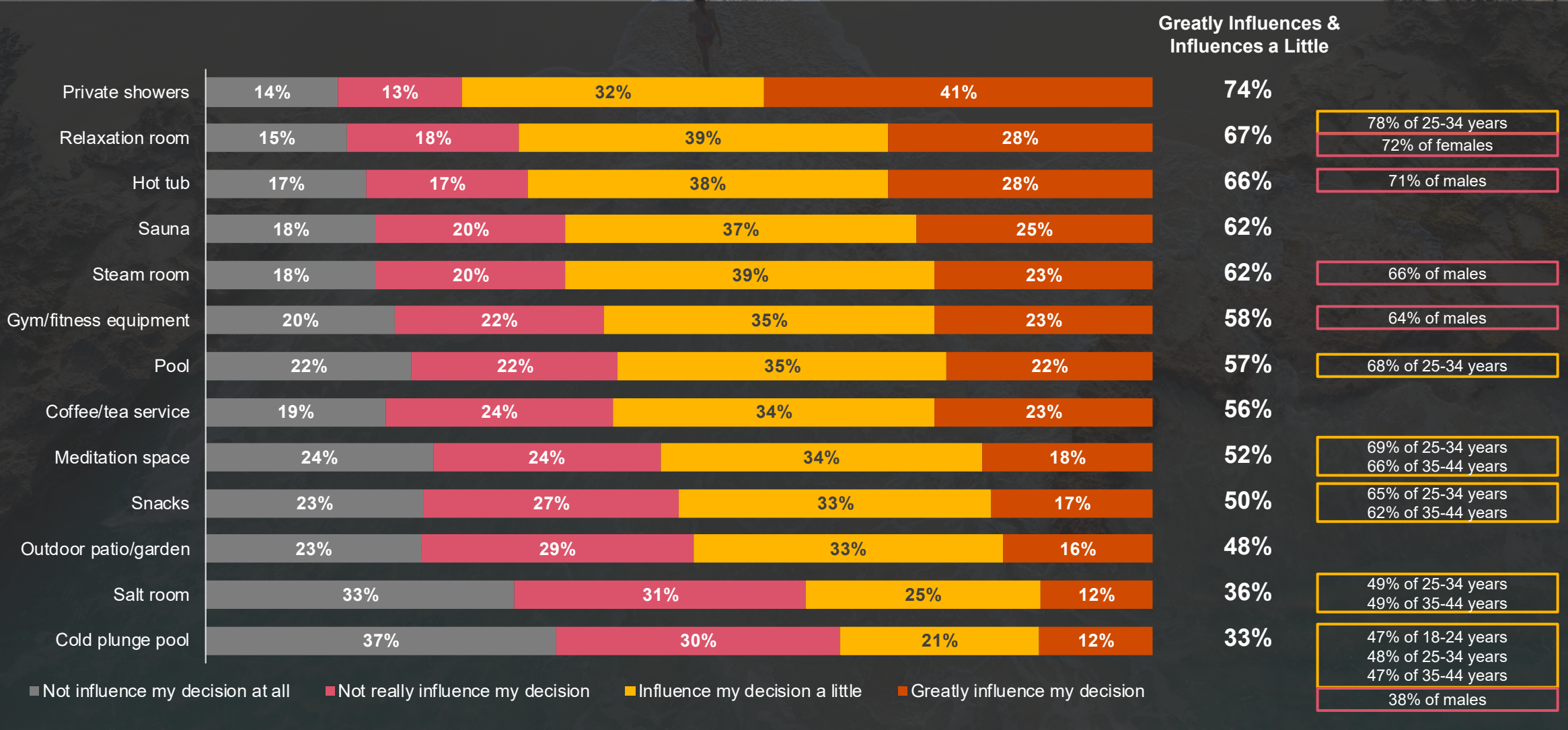
Q6a. Please rank the top 5 attributes that have the most influence on your decision to visit a spa. Base: All spa-goers (414)

# Top Attributes that Would Convince a Non-Spa-Goer to Visit a Spa



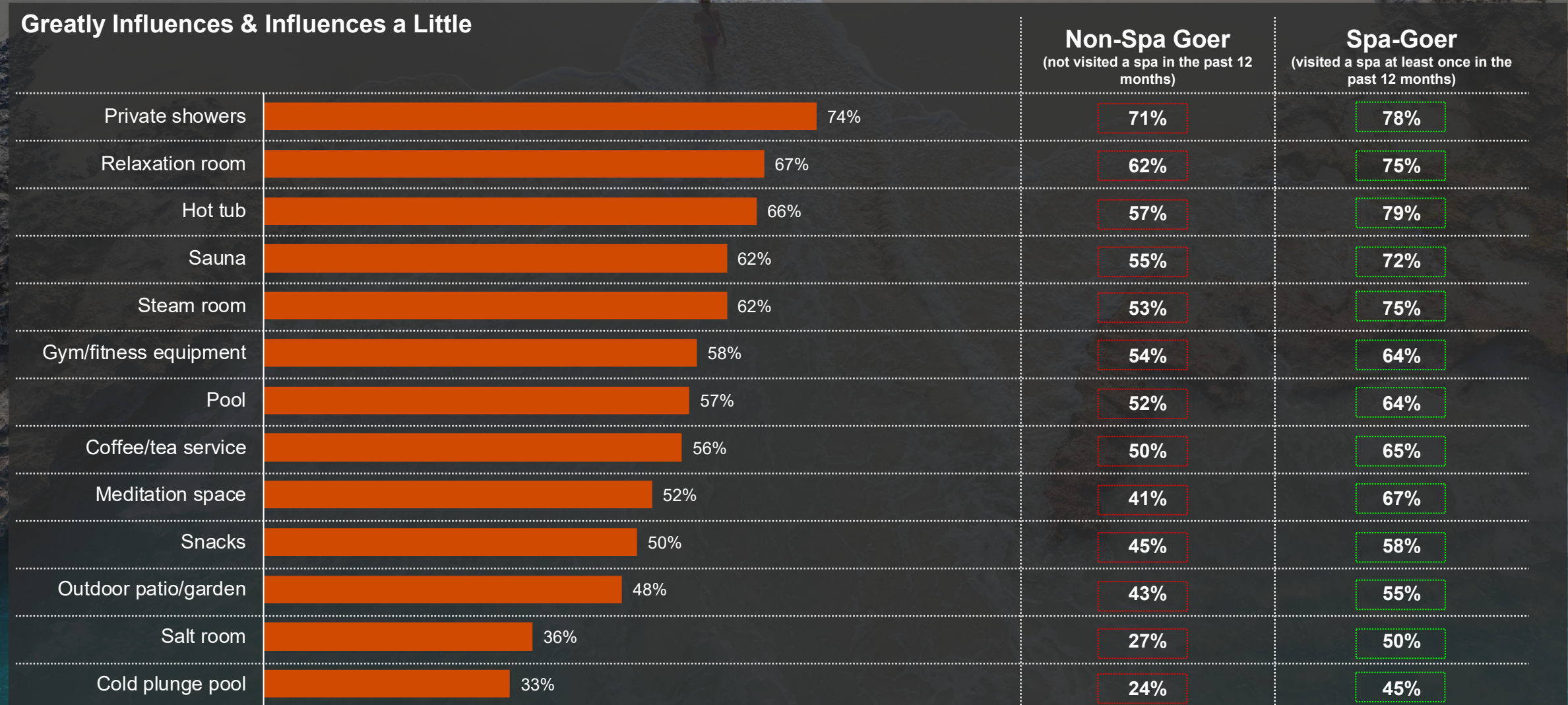
Q6b. Please rank the top 5 attributes that would influence your decision to visit a spa, or visit a spa more often. Base: All non-spa goers (586)

# Influence of Complimentary Amenities When Deciding to Visit a Spa



Q7. Looking at the following complimentary amenities, how much would they influence your decision to visit a spa? Base: All respondents (1000)

# Complimentary therapies have more of an influence on spa-goers in influencing their decision to visit a spa



Q7. Looking at the following complimentary amenities, how much would they influence your decision to visit a spa? Base: All respondents (1000)



# 04

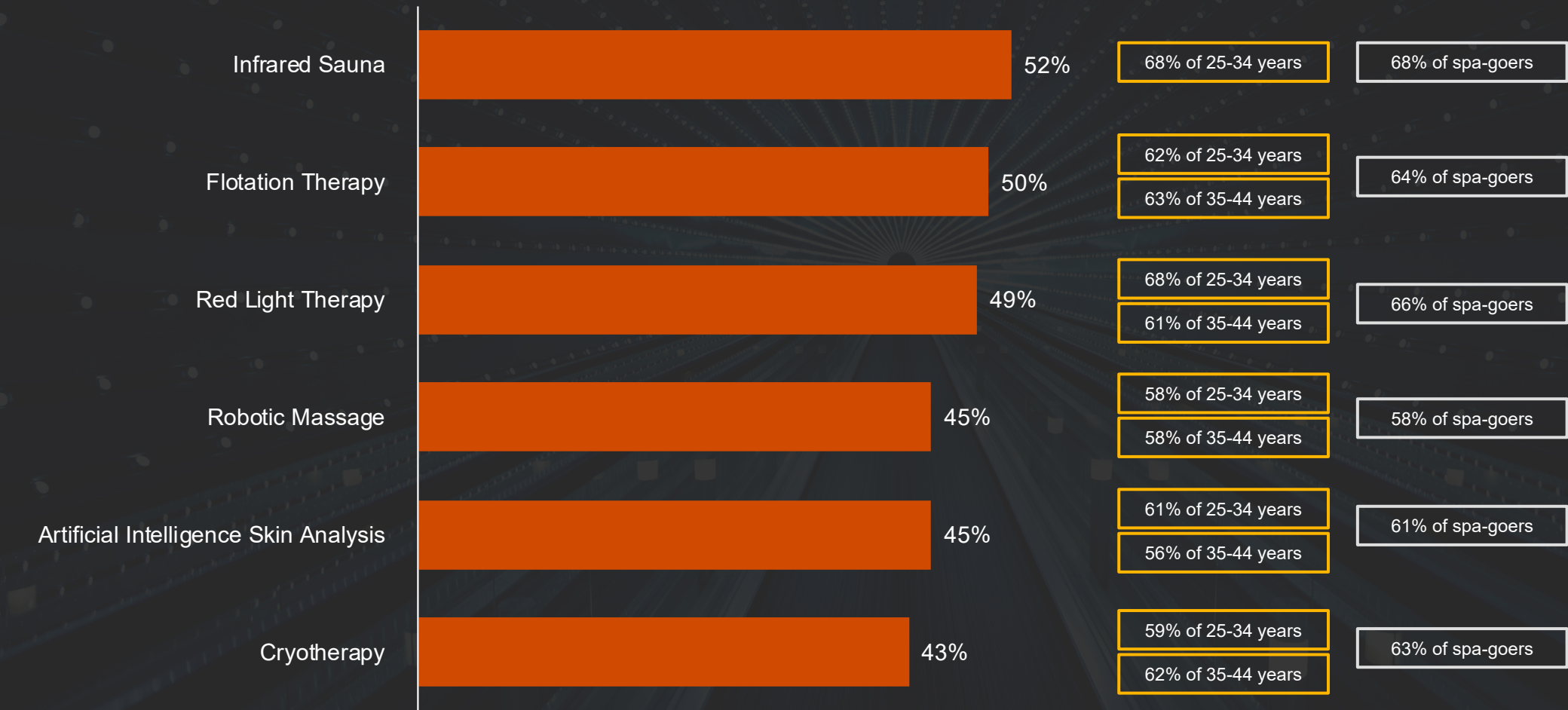
Technology

# Level of Interest in Trying Treatments that Incorporate Technology

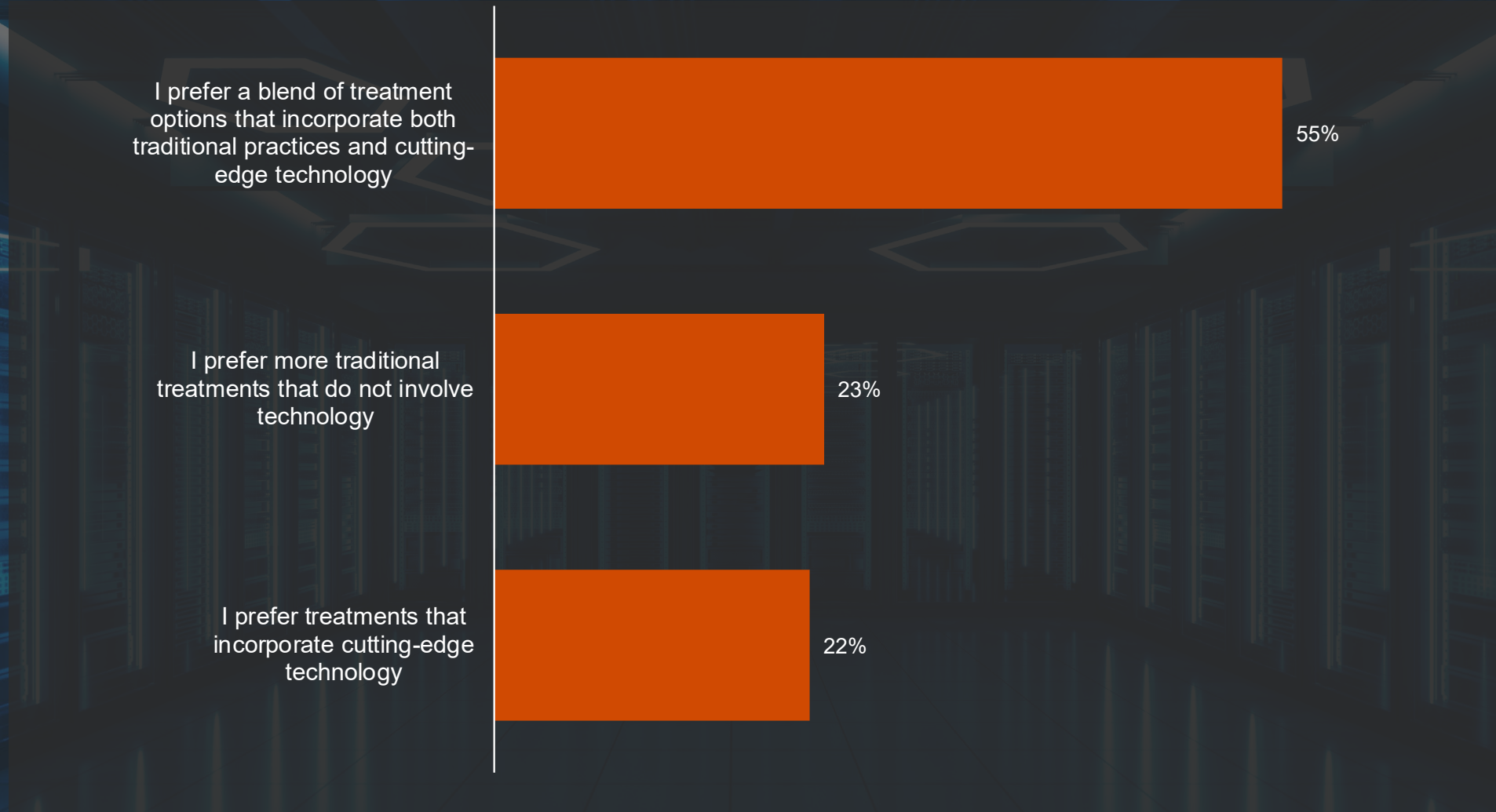
	Not at all interested	Not very interested	Somewhat interested	Very interested	I have already tried this	Very & Somewhat Interested
Infrared Sauna	27%	16%	30%	22%	4%	52%
Flotation Therapy	27%	19%	31%	20%	4%	50%
Red Light Therapy	27%	20%	27%	23%	4%	49%
Robotic Massage	33%	20%	27%	18%	2%	45%
Artificial Intelligence Skin Analysis	34%	19%	26%	19%	3%	45%
Cryotherapy	33%	21%	27%	17%	3%	43%

# Spa-goers and 25–44-year-olds show more interest in offerings with innovative technology

## Somewhat and Very Interested



# Most spa-goers prefer a blend of traditional and cutting-edge treatments





# 05

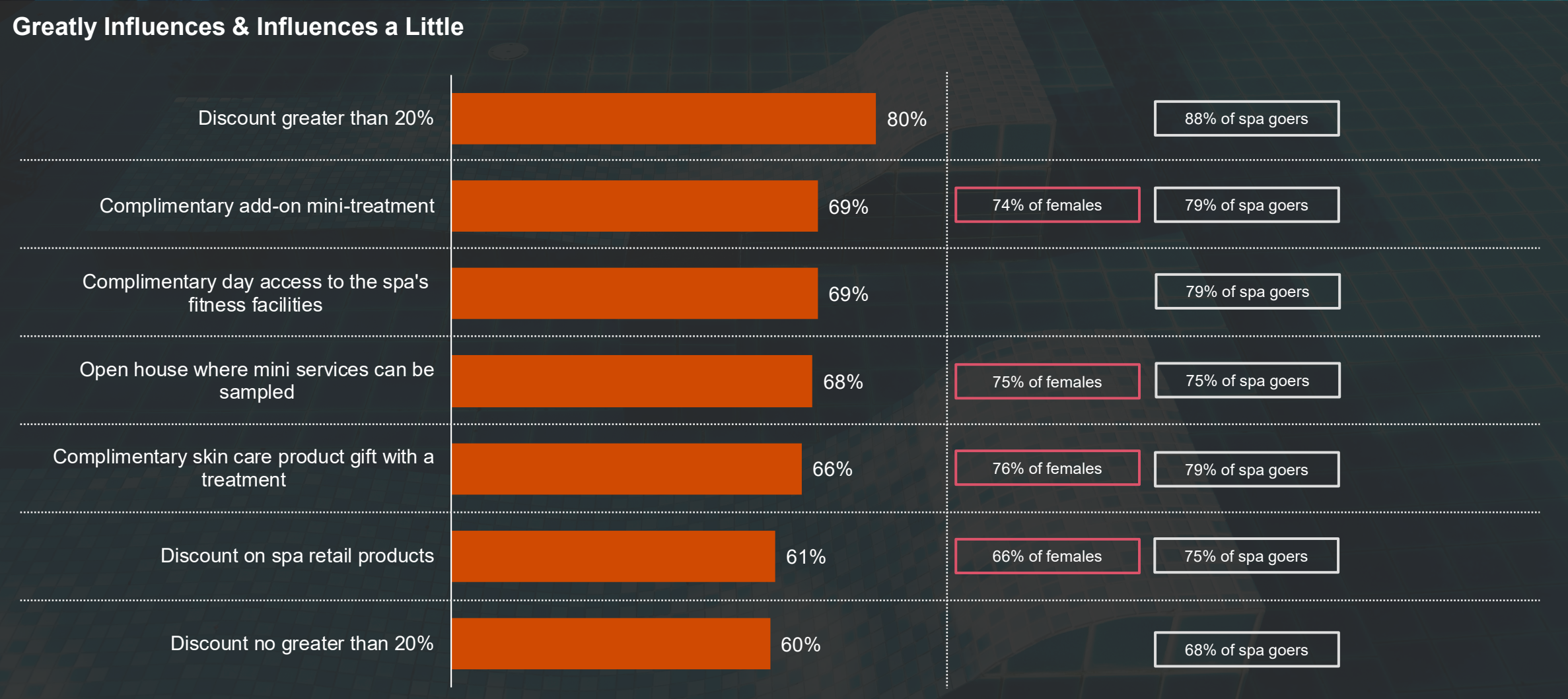
Motivation

# Discounts greater than 20% have the most influence when booking a spa treatment at a new spa location



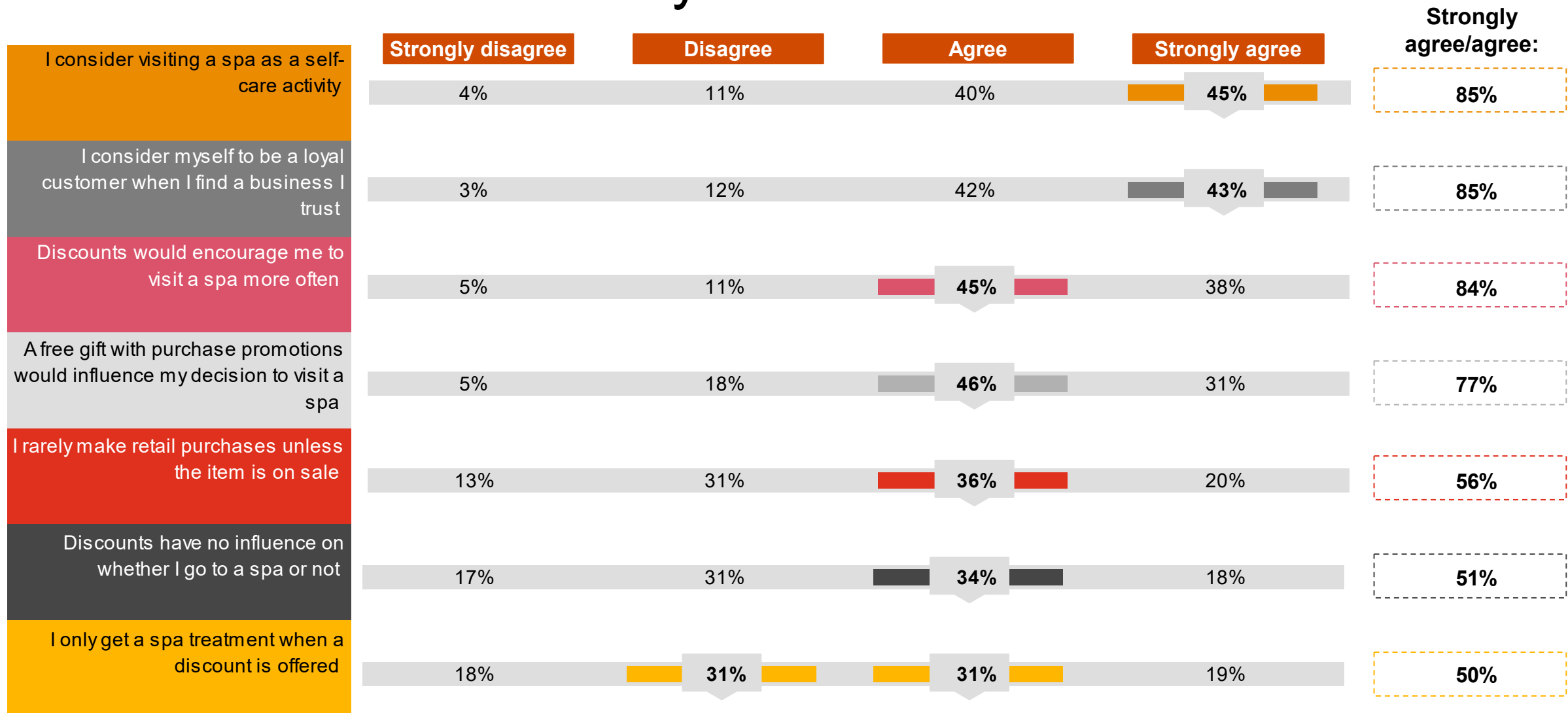
Q11. Looking at the following offerings, how much would they influence your decision to book a spa treatment at a spa location you've never previously visited? Base: All respondents (1000)

# Spa-goers and females are more likely to be influenced by various offerings to book a treatment at a new spa location



Q11. Looking at the following offerings, how much would they influence your decision to book a spa treatment at a spa location you've never previously visited? Base: All respondents (1000)

# Spa-goers agree that visiting a spa is a self-care activity, and see themselves as loyal customers

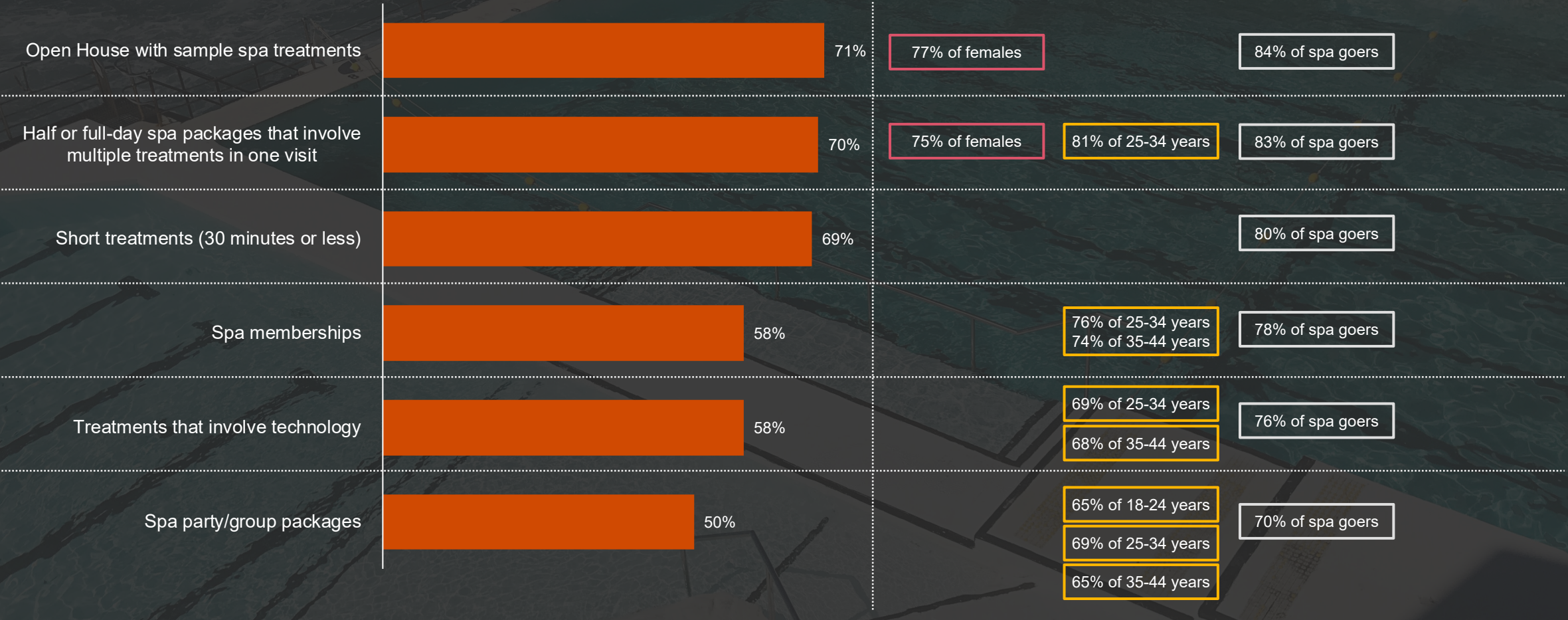


# Respondents are most likely to be interested in an open house, half/full day spa packages with multiple treatments and short treatments

	Not at all interested	Not very interested	Somewhat interested	Very interested	Very & Somewhat Interested
Open House with sample spa treatments	13%	16%	44%	27%	71%
Half or full-day spa packages that involve multiple treatments in one visit	15%	16%	40%	30%	70%
Short treatments (30 minutes or less)	13%	18%	48%	21%	69%
Spa memberships	20%	22%	37%	21%	58%
Treatments that involve technology	20%	23%	41%	17%	58%
Spa party/group packages	27%	23%	31%	19%	50%

# Spa-goers are more likely to be interested in various spa offerings

## Very & Somewhat Interested (all respondents)



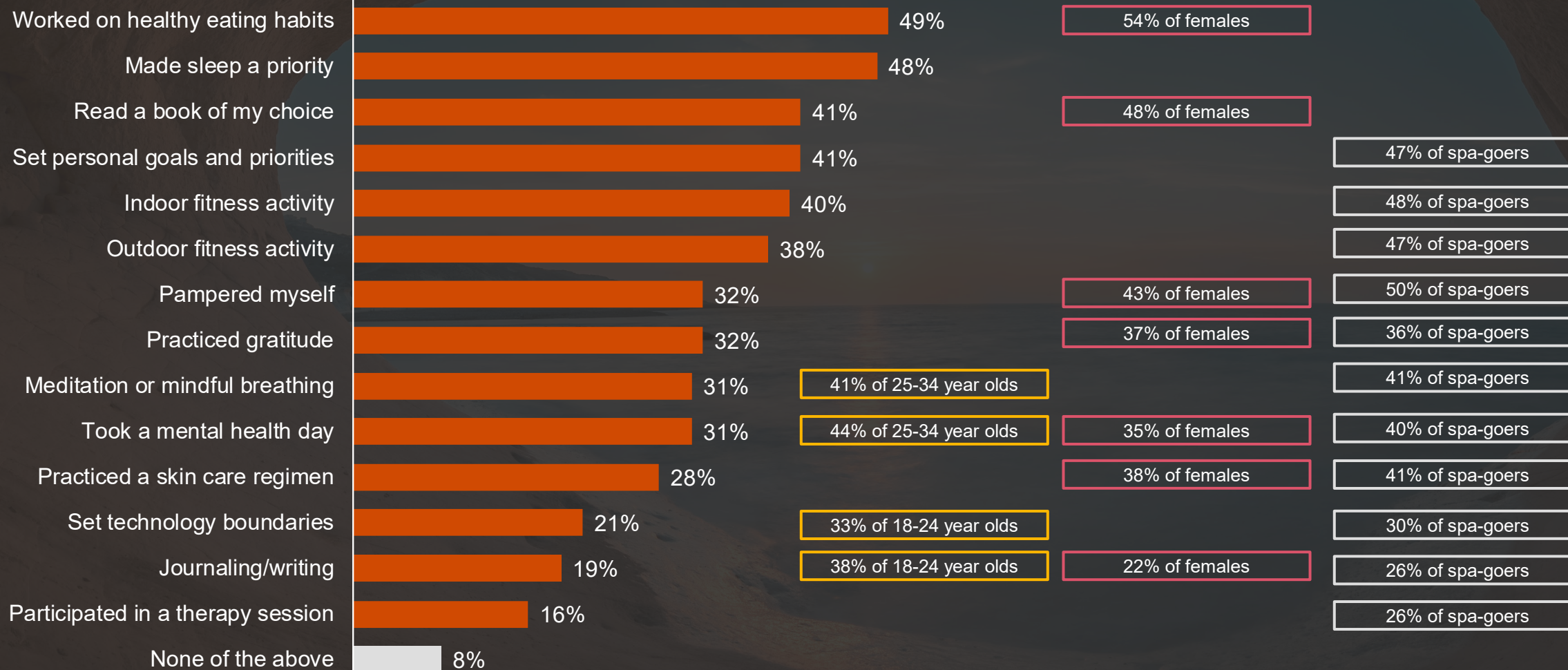
Q13. Please rate your level of interest in the following spa offerings. Base: All respondents (1000)

An aerial photograph of a coastline. The top half of the image shows a steep, light-colored rocky cliff face. Below the cliff is a wide, grey, sandy beach. The bottom half of the image shows the ocean with vibrant turquoise water. The water's color transitions to a darker teal as it approaches the shore. The overall scene is captured from a high angle, looking down at the coastline.

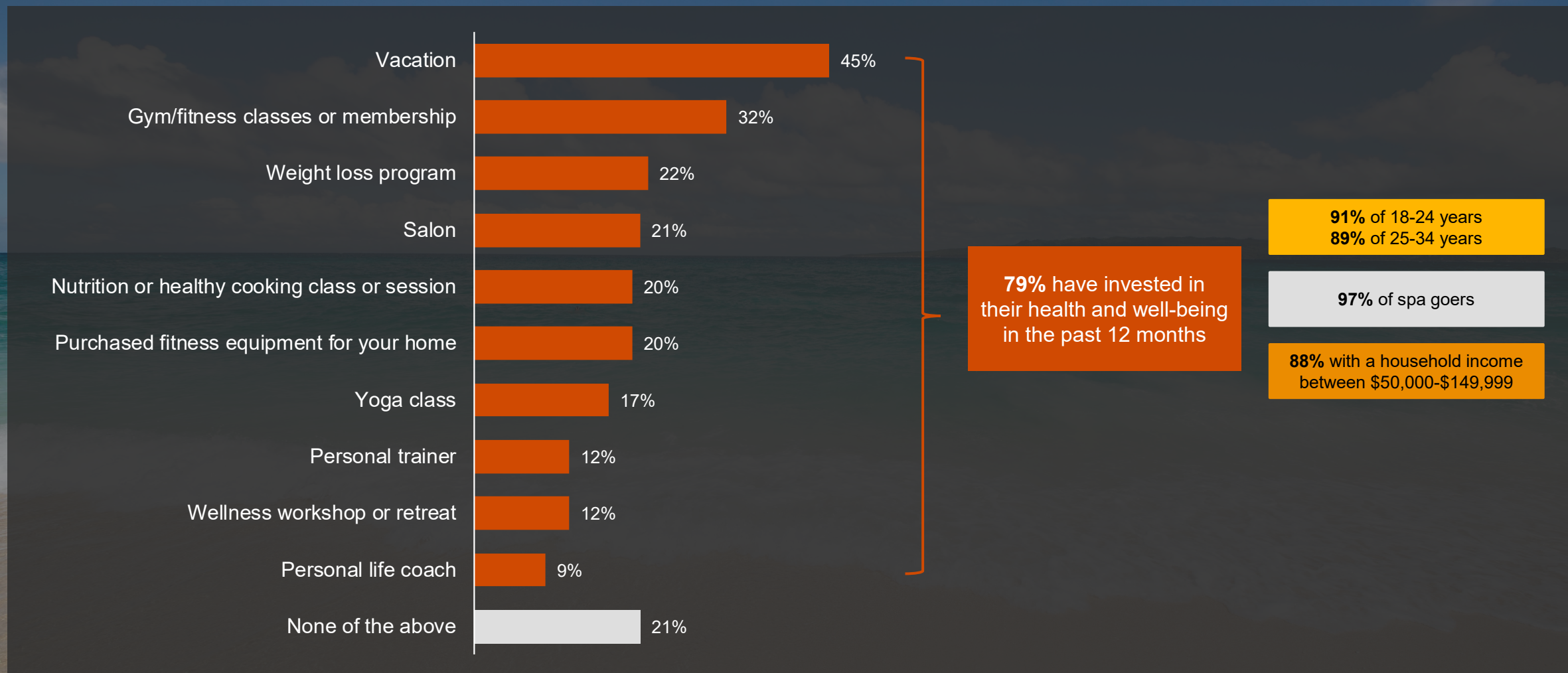
# 06

Lifestyle

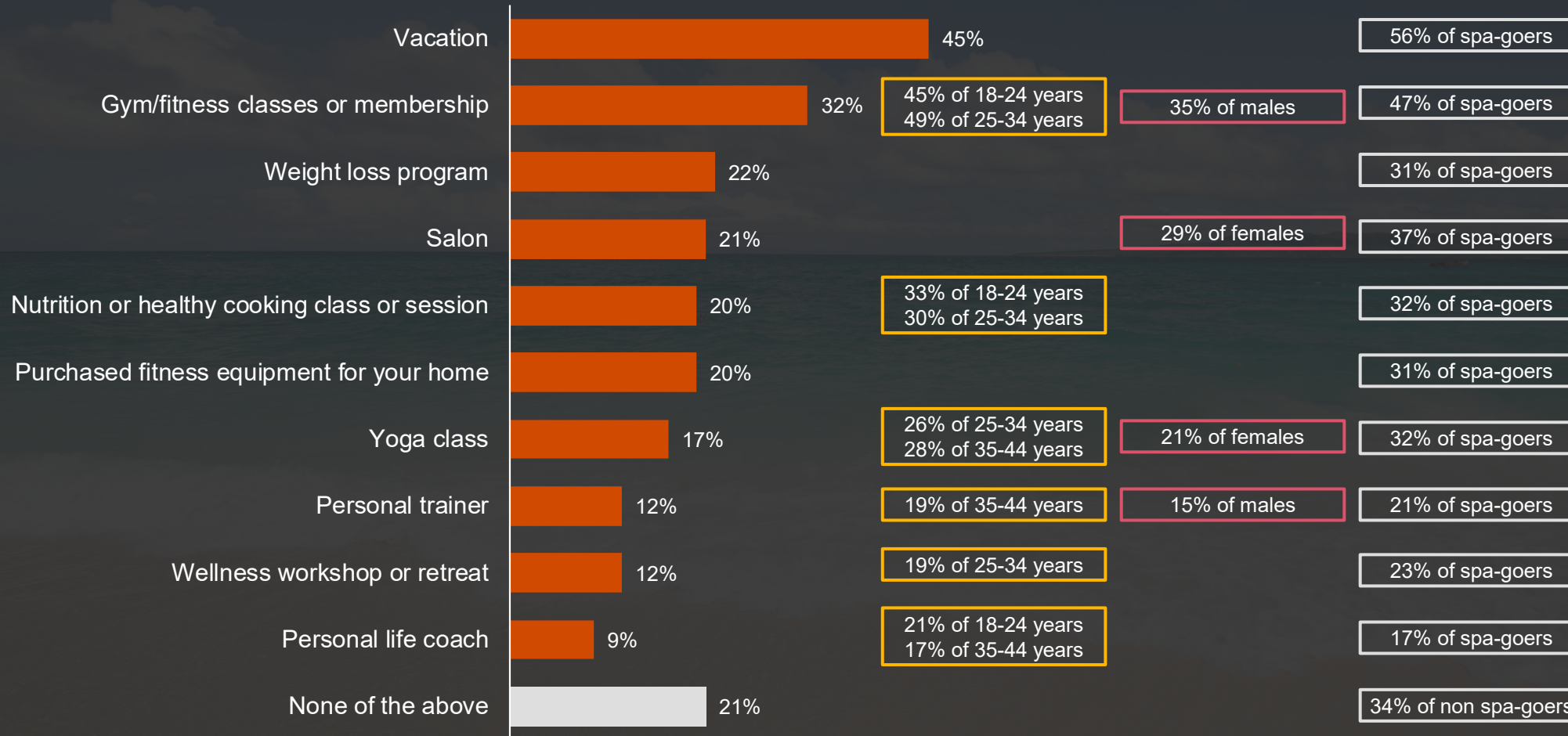
Over 90% of respondents undertook self-care activities in the past 12 months, with spa-goers more likely to have participated in many of the activities



# Areas Consumers are Investing in to Improve Their Health & Well-Being



# Younger people and spa-goers are more likely to invest in their health and wellbeing





06

Opportunities

# Personalization and making people feel at ease were cited as areas that would encourage more spa visits

*"Offering a **personalized relaxation experience**, such as a tailored massage or treatment plan, would encourage me to visit."*

Male, 35-44 years

SG

*"Specialized care where I only see one person for the all the services. Also I would like to see the **same person each time**."*

Female, 55-64 years

SG

*"Provide highly personalized treatment recommendations based on **individual needs and preferences**, creating a more tailored and relevant experience for each customer."*

Male, 25-34 years

SG

*"I think a spa could really encourage me to visit by offering a **unique experience** that goes beyond the usual massage or facial—something that feels more personal or **tailored to my needs**. For example, a spa could offer a **custom wellness consultation** where they assess your current mood, stress levels, and physical condition, and then design a package specifically for you, whether that's a mix of treatments or a personalized relaxation plan. Maybe they could also throw in a complimentary session, like meditation or guided breathing, to help ease my mind even before the treatments start. Anything that makes me feel like I'm not just another customer, but rather someone who's **receiving a personalized, holistic experience**, would definitely draw me in."*

Male, 25-34 years

NSG

*"Be **especially welcoming and explain everything to newcomers** or people who haven't been to your establishment. It can be a bit intimidating even though you know it's going to relax you and you're doing something for yourself."*

Female, 55-64 years

NSG

*"Make me feel welcomed."*

Male, 25-34 years

SG

*"Friendliness of the staff and make me feel **comfortable**."*

Male, 45-54 years

SG

*"More friendly upbeat people that greet you when you walk in to feel **more comfortable not intimidated**."*

Female, 45-54 years

NSG

## Personalization

## Making people feel at ease

# Price, more advertising and complimentary offers were also mentioned

*"Have reasonable prices."*

Male, 65 years +

NSG

*"More affordable."*  
Female, 55-64 years

SG

*"Have more affordable options or samples."*

Female, 25-34 years

NSG

*"The spa could lower the price to encourage me to come."*  
Male, 25-34 years

NSG

*"One thing would be to lower the prices and make things more affordable for the people who can not afford a lot but would love to visit, that would make it so much nicer."*

Male, 25-34 years

SG

## Price

*"More active advertisement. Specifically in my area, I feel like spas are more known through word of mouth than actual advertising with the use of billboards, tv commercials, signs, etc."*

Male, 18-24 years

SG

*"Whatever the incentive, advertise it. Maybe on Groupon. People looking for party packages tend to spread the word."*

Male, 25-34 years

SG

*"Getting the word out, flyers or something that would advertise their services."*

Male, 55-64 years

NSG

*"Marketing on online social media and forums."*

Male, 25-34 years

SG

## Increased advertising

*"The one thing that would most encourage a visit to a spa would be a complimentary visit that would allow me to see the services offered at that location."*

Male, 65 years +

NSG

*"I would like them to invite me to an open house and show and explain to me what's included and give me a 25% offer off for my first time visit. That would get me there."*

Female, 65 years +

NSG

*"Offer discounts on signing up for membership or gifts, relaxing environment with complimentary drinks and cafeteria for food and discounts on spa members package."*

Female, 45-54 years

NSG

## Complimentary offers

# Thank you

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