





ISPA 2008 Global Consumer Study



Study Timelines and Definitions

Europe											
Austria		France		Germany		Italy		Spain		UK	
											
Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End
Sept 12 th	Sept 28 th	Sept 24 th	Oct 1 st	Sept 19 th	Oct 1 st	Sept 17 th	Oct 1 st	Sept 23 rd	Oct 1 st	Sept 12 th	Sept 19 th

Asia-Pacific						North America			
Australia		Japan		Singapore		Canada		USA	
									
Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End
Sept. 22 nd	Oct 4 th	Sept 19 th	Oct 2 nd	Sept 12 th	Sept 30 th	Sept 17 th	Sept 29 th	Sept 5 th	Sept 17 th

Internet Population*							
China		India		Russia		Thailand	
							
Field Start	Field End	Field Start	Field End	Field Start	Field End	Field Start	Field End
Sept 22 nd	Sept 30 th	Sept 17 th	Oct 2 nd	Sept 24 th	Oct 1 st	Sept 25 th	Oct 4 th

- Spa** A spa is defined as offering at least TWO of the following services:
 Massage (e.g., full body)
 Body Treatments (e.g., hydrotherapy or body wraps/scrubs)
 Skin Care Treatments (e.g., facials)
- Active Spa-goer** A person who has attended a spa in the past 12 months
- Inactive Spa-goer** A person who has attended a spa before, but has not been to a spa in the past 12 months
- Non-spa-goer** A person who has never attended a spa

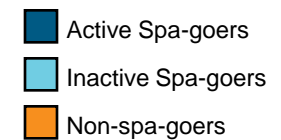
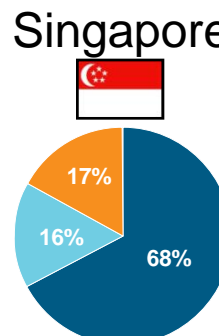
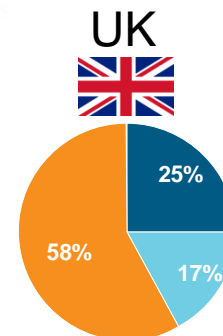
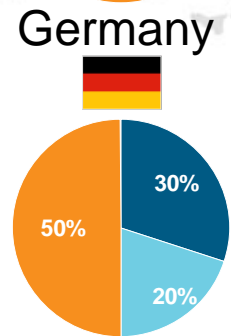
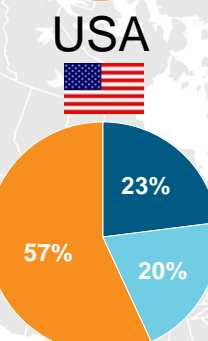
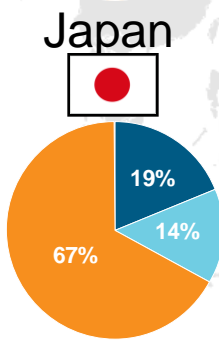
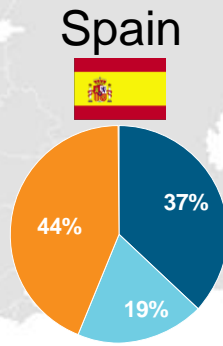
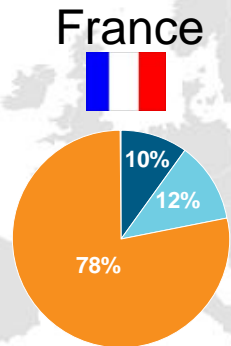
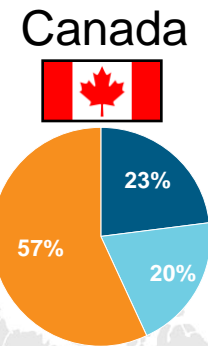
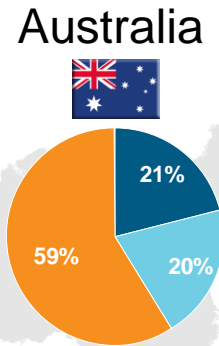
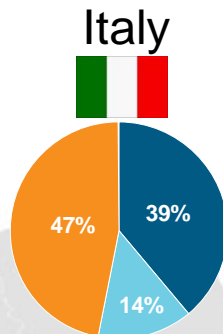
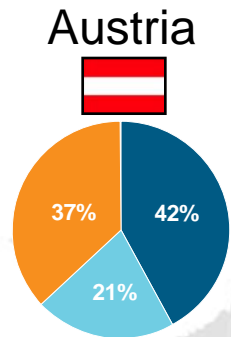
Sample Representation

- In order to compare results between countries, one data collection method, online, was used.
- Internet penetration is extremely low (ranges from 9% to 20%) at the current time in China, India, Thailand and Russia.
 - The objective of incidence measurement will not be pursued in these four countries due to low Internet penetration.
 - Basic quotas on age and gender were in place to gain a mix of respondents for these countries; however, the composition of the Internet panel is not representative of the population.
 - Across these countries the sample is younger, more likely to be employed and are more likely to be in a high income or social class.
 - The sample for these countries can be classified as a convenience sample. A **convenience sample** chooses the individuals that are easiest to reach. Convenience sampling does not represent the entire population so it is considered biased.



Spa Incidence

Past 12 Months



In the past 12 months, have you been to a spa?
Have you ever been to a spa?

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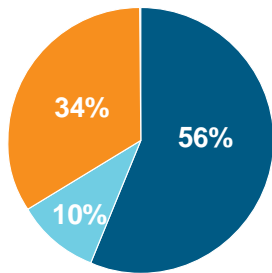


Spa Incidence

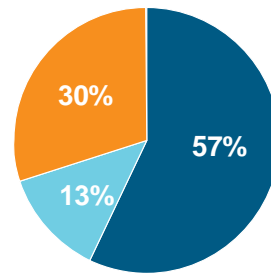
Past 12 Months

Internet Population*

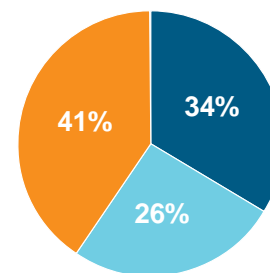
China



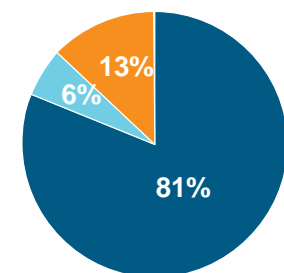
India



Russia



Thailand



- Active Spa-goers
- Inactive Spa-goers
- Non-spa-goers

In the past 12 months, have you been to a spa?
Have you ever been to a spa?

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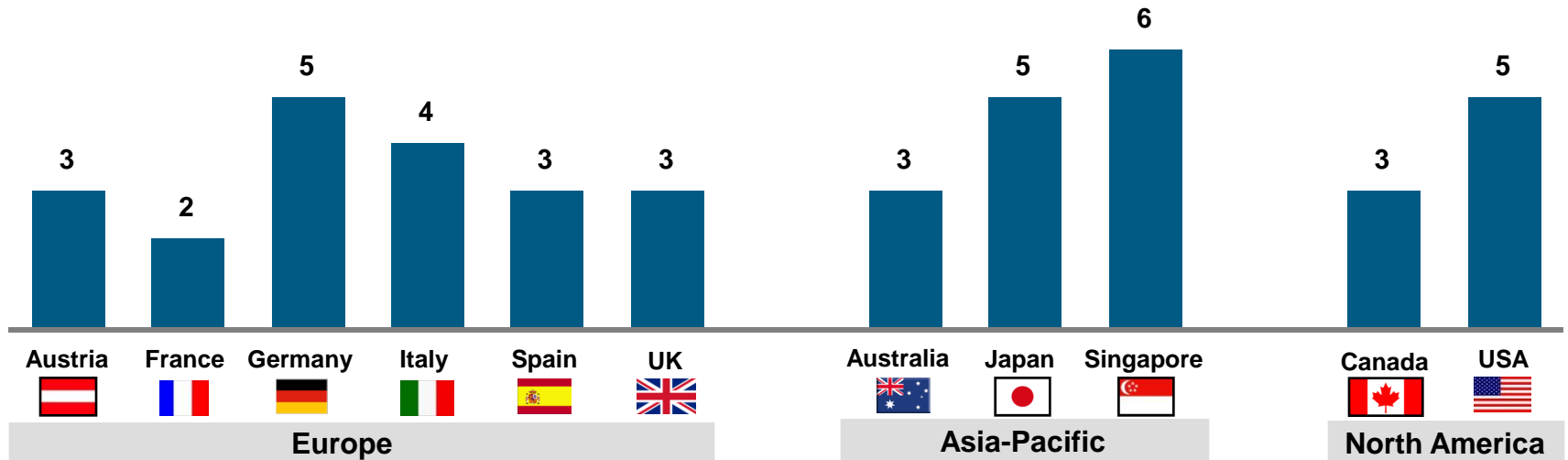
* Convenience sample



Average Number of Visits

Past 12 Months; Active Spa-goers

- Globally, spa-goers average about four visits per 12 months.



How many times have you been to a spa in the past 12 months?

Mean data shown

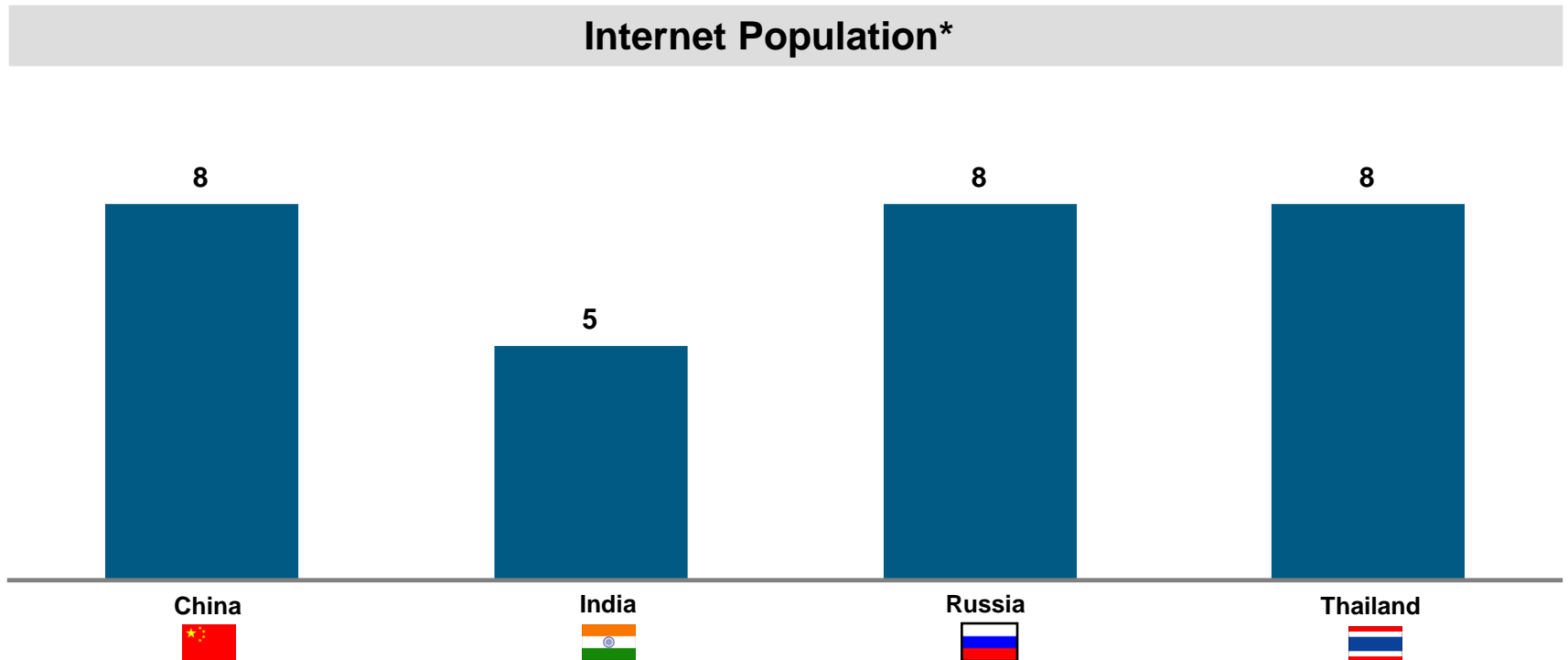
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Average Number of Visits

Past 12 Months; Active Spa-goers

- Spa-goers in these countries average more than 5 spa visits per year.



How many times have you been to a spa in the past 12 months?

Mean data shown

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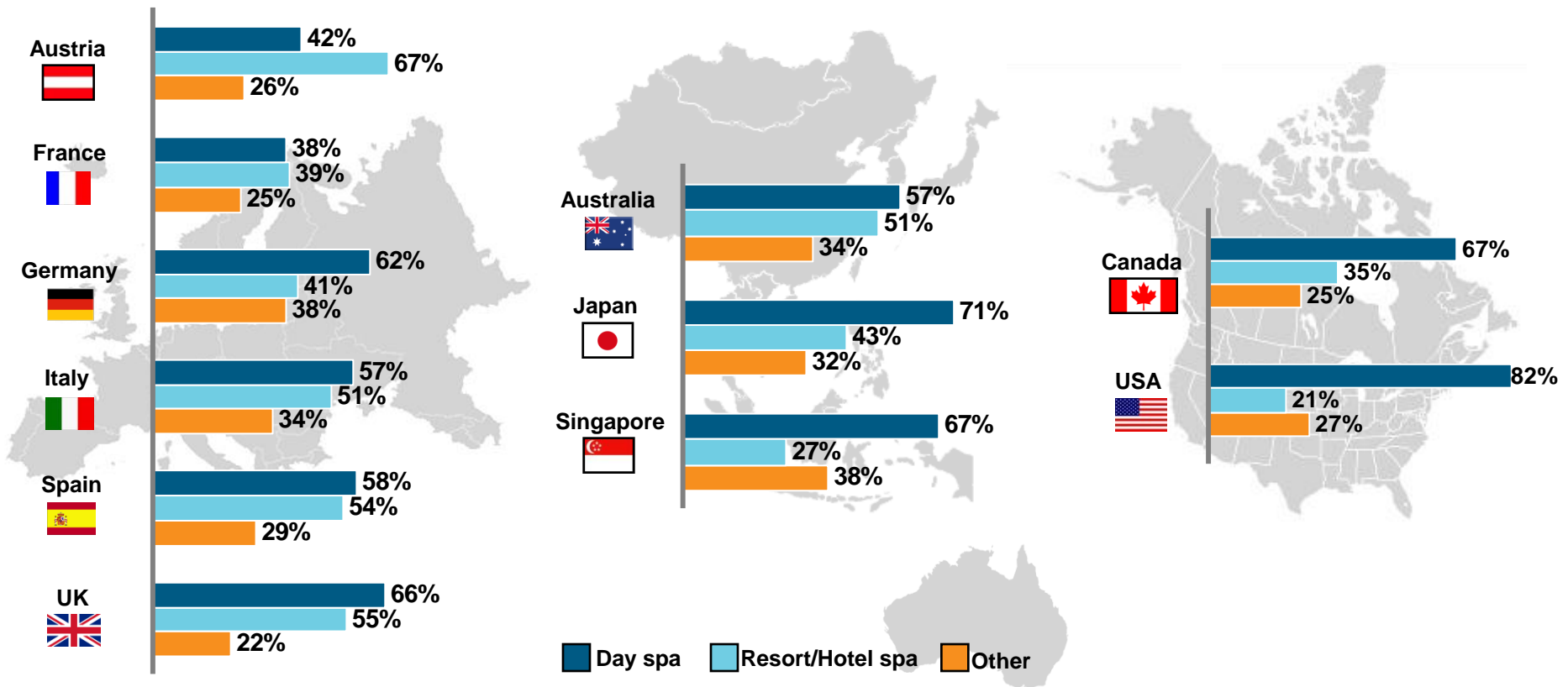
* Convenience sample



Type of Spa Visited

Past 12 Months; Active Spa-goers

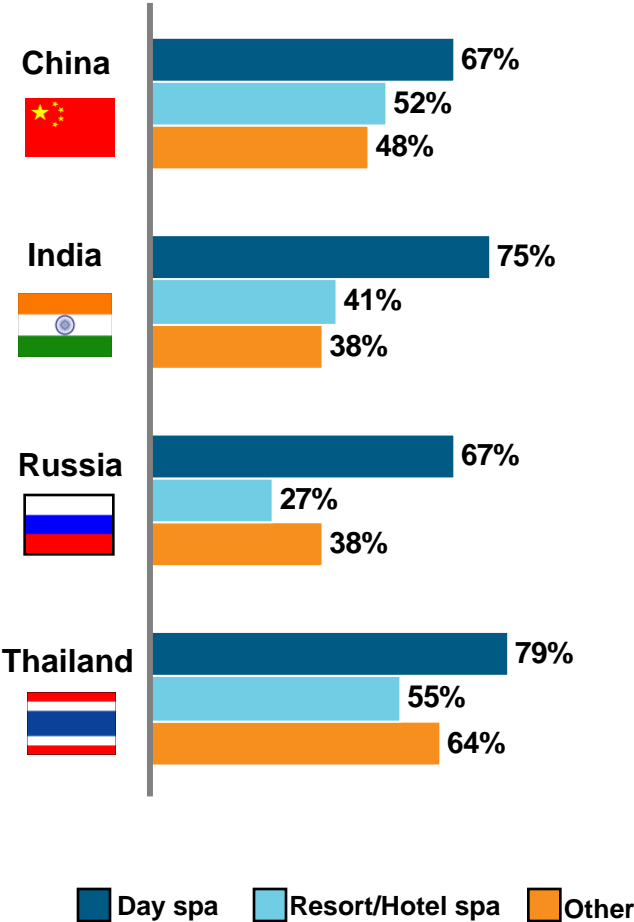
- Day spas are more popular than other types of spas in all countries except Austria and France.



Type of Spa Visited

Past 12 Months; Active Spa-goers

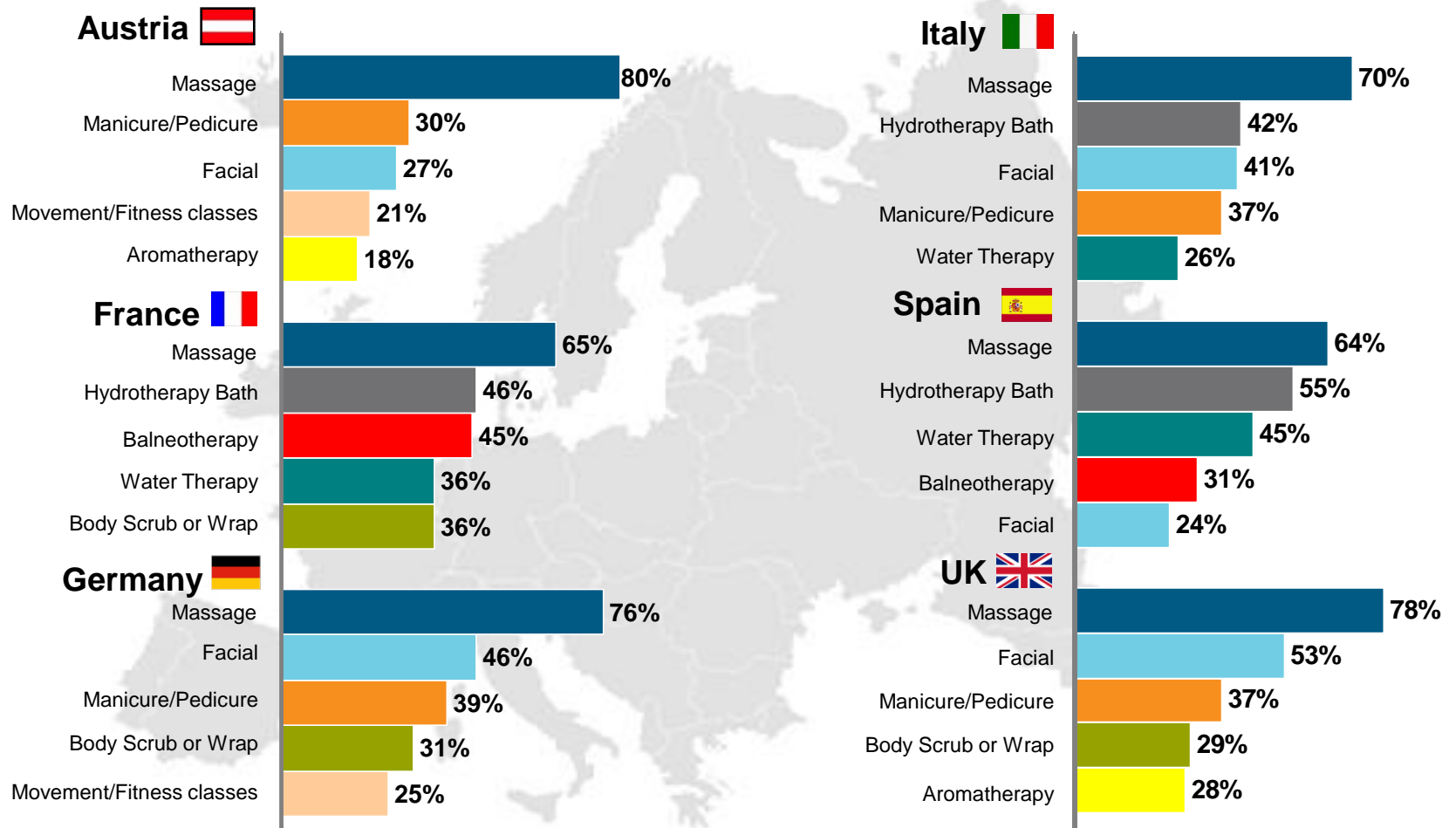
Internet Population*



Top 5 Treatments - Europe

Past 12 Months; Active Spa-goers

- In France, Italy and Spain, hydrotherapy bath treatments are received by more than 40% of spa-goers.



Which of the following treatments have you received at a spa in the past 12 months? (Select all that apply)

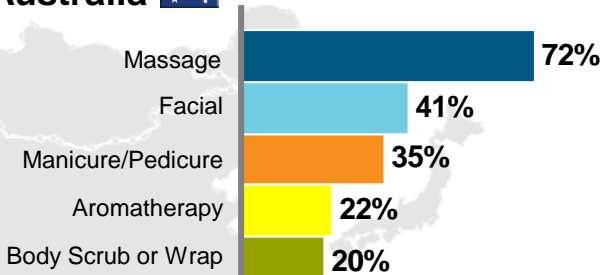
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Top 5 Treatments – Asia-Pacific & North America

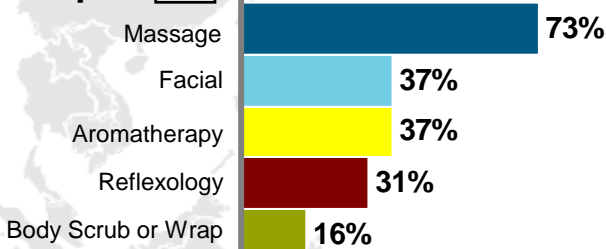
Past 12 Months; Active Spa-goers

- Massage is the top treatment received in Asia-Pacific and North American countries.

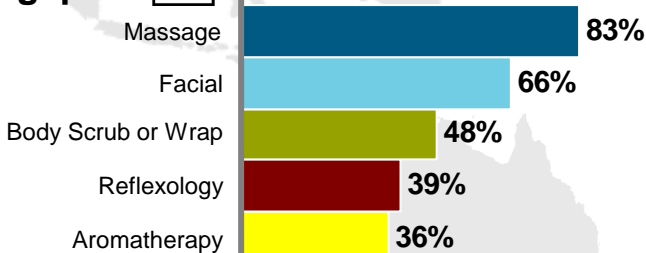
Australia



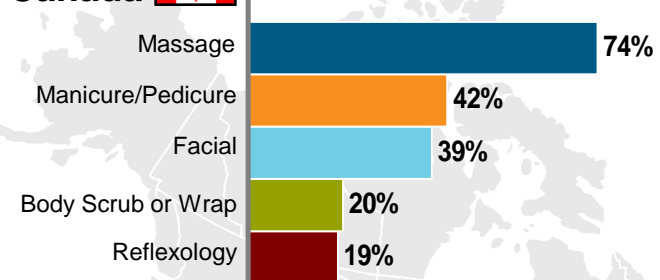
Japan



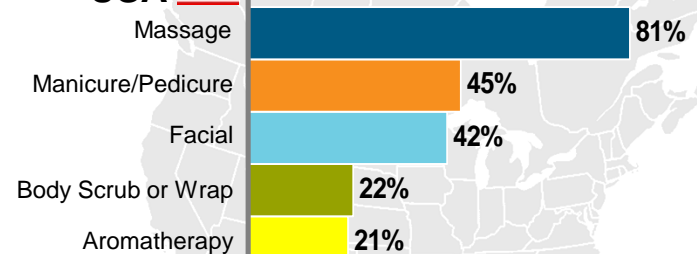
Singapore



Canada



USA



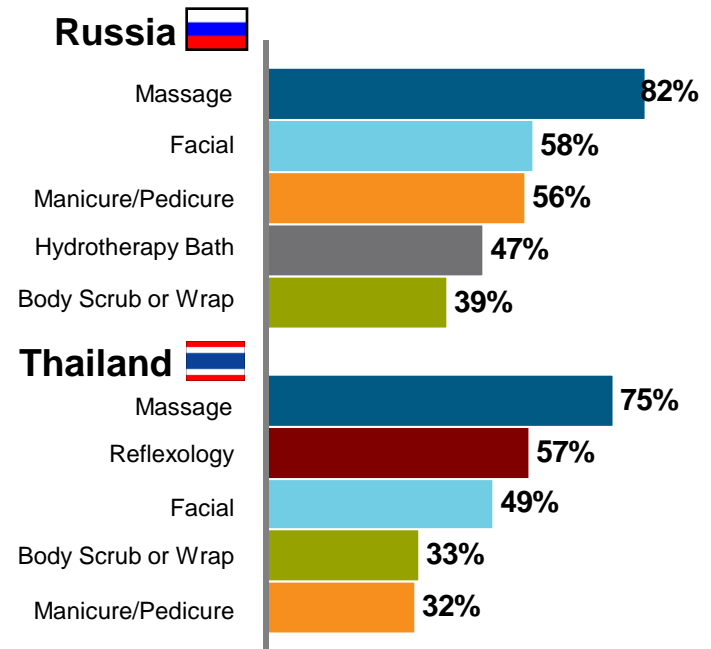
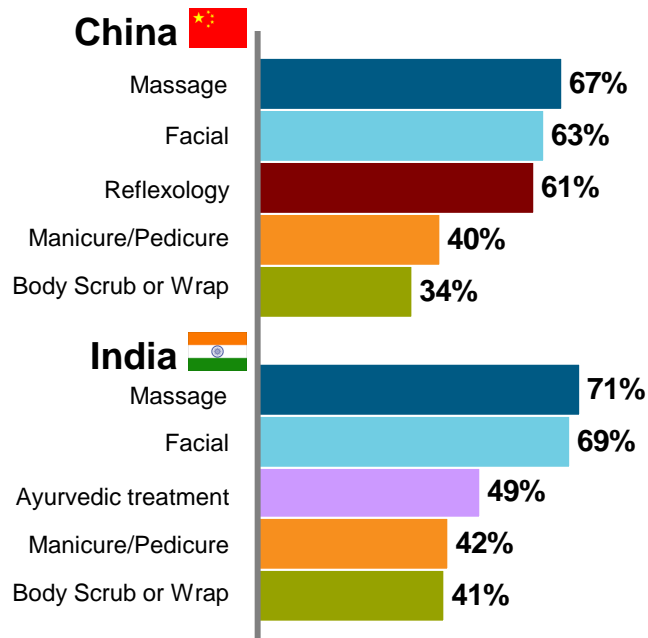
Which of the following treatments have you received at a spa in the past 12 months? (Select all that apply)

Top 5 Treatments

Past 12 Months; Active Spa-goers

- Massage and facial treatments are the most popular for these spa-goers.

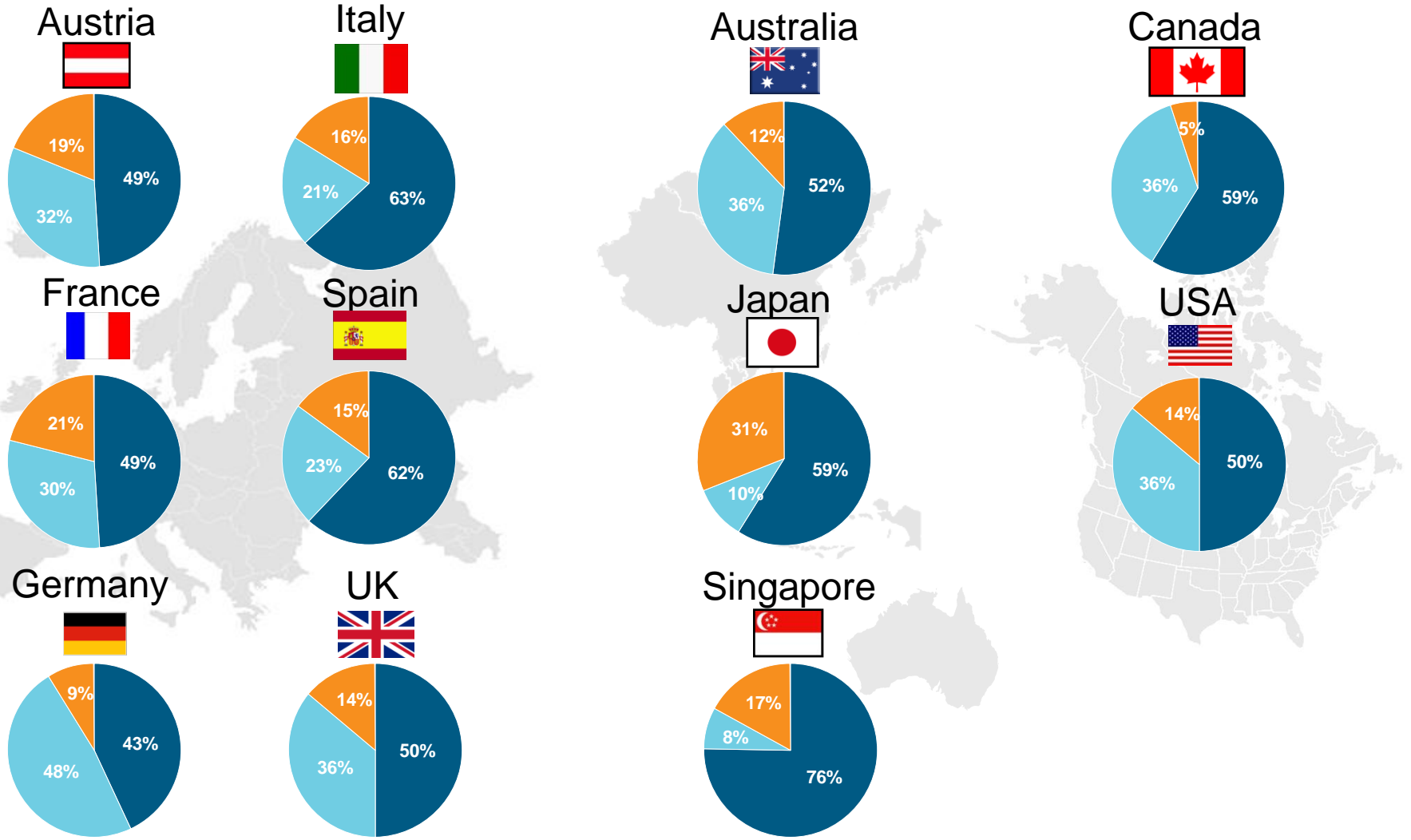
Internet Population*



Purchase, Gift or Complimentary

Most Recent Treatments; Active Spa-goers

■ In Canada and the United States, 36% of spa-goers' last treatment was a gift.



On your most recent visit, did you purchase these treatments or was it a gift or complimentary service from the spa?



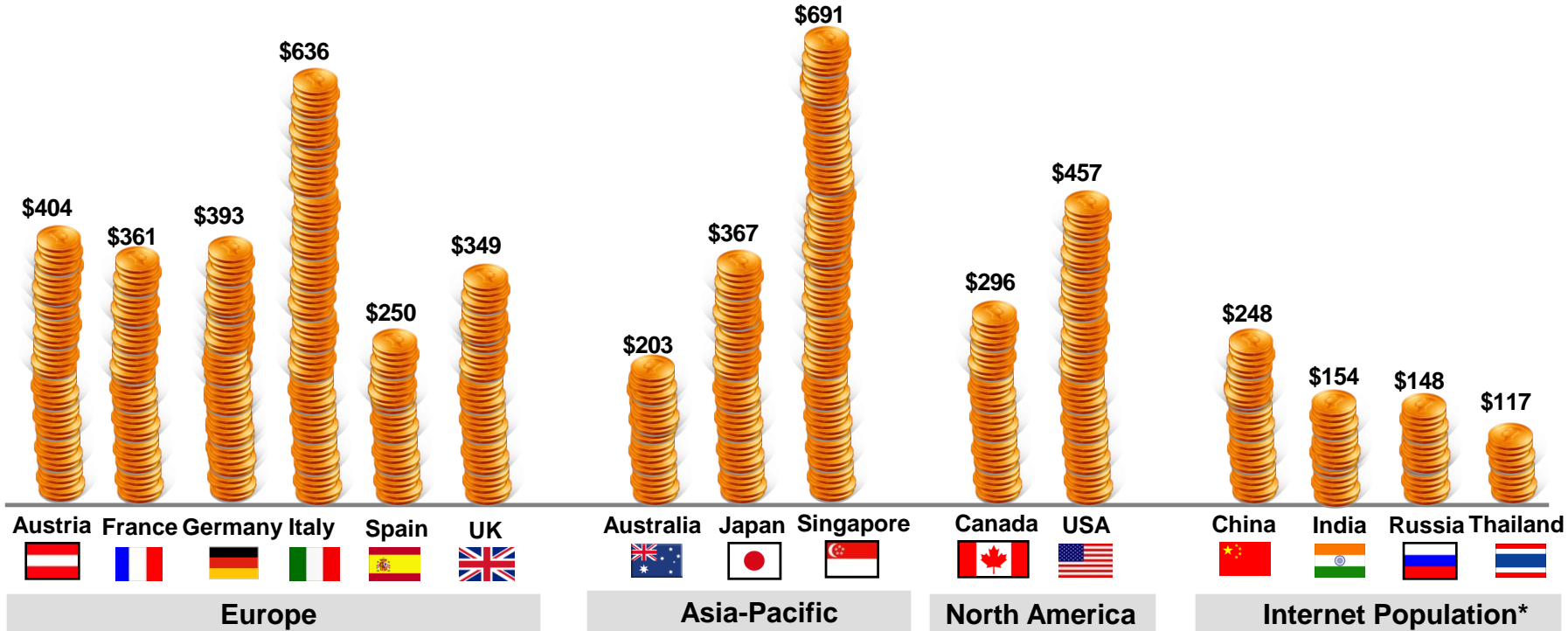
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Amount Spent on Treatments

Past 12 Months; Active Spa-goers

- The average spa-goer in Italy and Singapore spent more than \$600 on spa treatments within the past 12 months.



How much did you spend in total on spa treatments in the past 12 months?
Amounts stated in U.S. dollars



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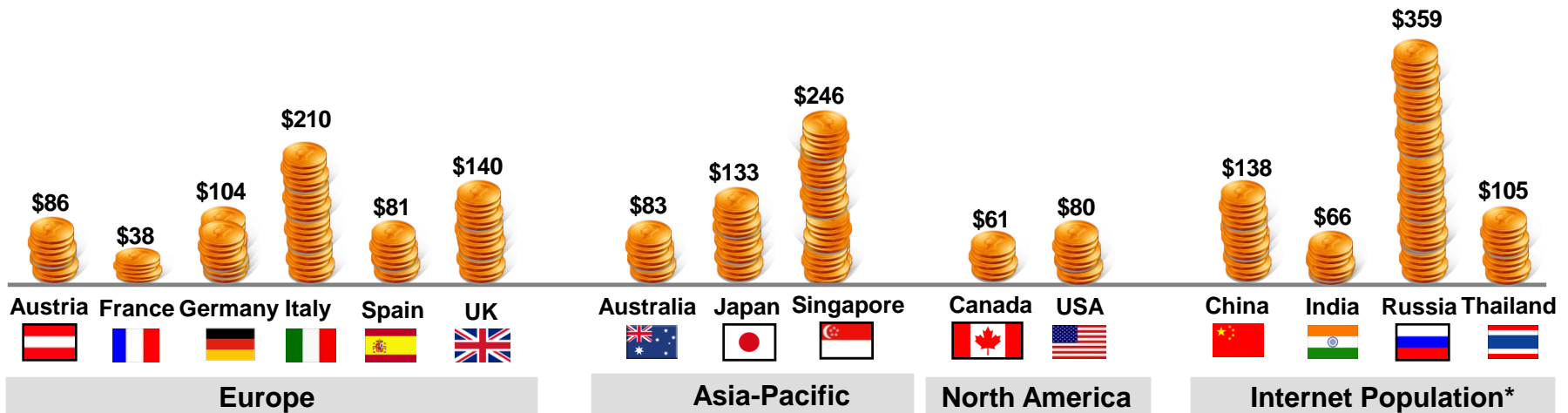
* Convenience sample



Amount Spent on Retail Products

Past 12 Months; Active Spa-goers

- The amount spent on spa retail products ranges from \$38 in France to more than \$200 in Italy, Russia and Singapore.



How much did you spend at spas on spa retail products (e.g., skin care products, etc.) in the past 12 months?
Amounts stated in U.S. dollars

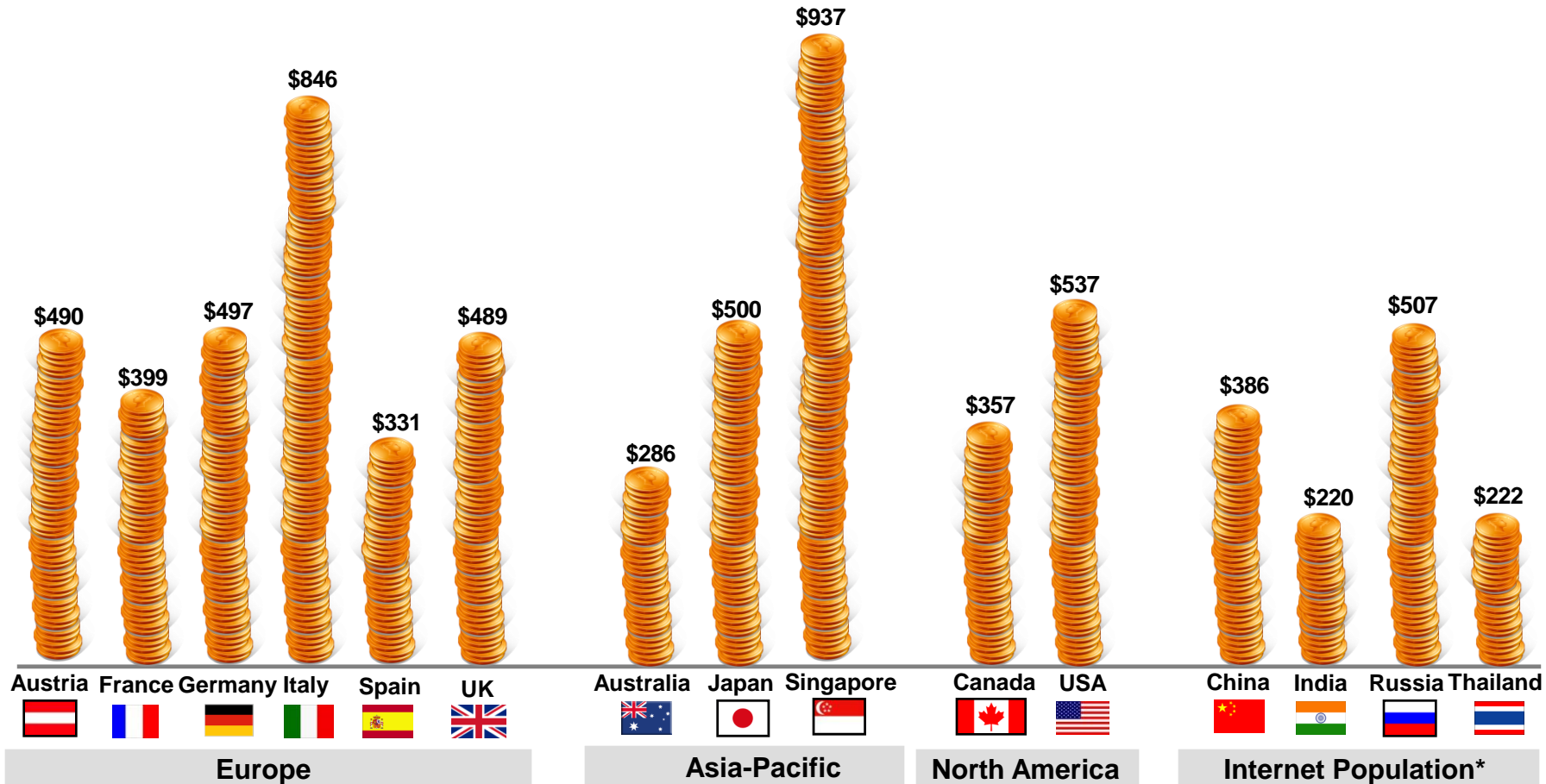
* Convenience sample



Total Amount Spent

Past 12 Months; Active Spa-goers

- Active spa-goers in Singapore spent the most within the past 12 months on spa treatments and retail products.


















Visit Motivators

Total Sample

- In all countries, the top spa visit motivators are recommendations from family, friends or health care practitioners, or price incentives.

Top Motivators for Visiting a Spa

		Europe						Asia-Pacific			N. America		Internet Population*			
	Avg	Austria	France	Germany	Italy	Spain	UK	Australia	Japan	Singapore	Canada	USA	China	India	Russia	Thailand
																
Friends and/or Family recommendations	46%	48%	36%	46%	46%	53%	41%	37%	32%	63%	41%	45%	46%	54%	61%	44%
Gift Certificate	37%	47%	-	21%	25%	20%	25%	60%	11%	51%	61%	22%	40%	53%	40%	38%
Health care practitioner recommendation	25%	37%	15%	21%	23%	15%	24%	31%	-	25%	29%	30%	22%	28%	39%	17%
Complimentary products or bonus services	31%	22%	45%	35%	21%	21%	38%	27%	53%	-	24%	38%	-	-	16%	-
Packages	20%	26%	15%	16%	16%	16%	18%	17%	11%	19%	21%	15%	29%	28%	27%	26%
Advertised Sale	21%	26%	13%	-	16%	16%	15%	16%	14%	37%	18%	12%	46%	17%	14%	38%
Appt. times that meet your schedule and needs	17%	17%	15%	11%	13%	17%	14%	11%	11%	30%	11%	11%	19%	23%	20%	26%
Membership option that offers better pricing or additional benefits	20%	-	14%	12%	-	10%	13%	-	-	40%	-	10%	18%	29%	23%	29%

"-" Less than 10%

Which three, if any, of the following would most motivate you to visit a particular spa?

* Convenience sample


















Primary Reasons for Going to a Spa

Spa-goers

- Primary reasons for going to a spa are to relax and relieve/reduce stress or for overall health.

Primary Reasons for Going to a Spa

		Europe						Asia-Pacific			N. America		Internet Population*			
	Avg	Austria	France	Germany	Italy	Spain	UK	Australia	Japan	Singapore	Canada	USA	China	India	Russia	Thailand
																
Relax and relieve/ reduce stress	60%	63%	58%	53%	59%	67%	64%	60%	71%	70%	60%	62%	50%	55%	49%	61%
Overall wellness/health	37%	53%	56%	42%	45%	47%	24%	24%	13%	30%	30%	21%	44%	43%	50%	29%
Pampered	29%	46%	18%	43%	22%	26%	42%	39%	-	43%	33%	38%	-	14%	20%	15%
Soothe sore joints/ muscles	24%	15%	38%	18%	25%	30%	24%	30%	18%	25%	26%	29%	21%	12%	17%	39%
Self-indulgent	23%	37%	34%	34%	-	-	15%	16%	34%	13%	22%	19%	12%	10%	29%	30%
Therapeutic for my body	19%	20%	13%	20%	19%	24%	15%	15%	32%	15%	19%	18%	19%	19%	27%	16%
Make me look better	21%	-	-	10%	25%	14%	18%	11%	10%	24%	18%	18%	31%	35%	34%	30%
Therapeutic for my mind	17%	-	-	-	20%	14%	12%	11%	25%	-	14%	20%	-	18%	-	-
Look younger	22%	-	-	-	10%	-	-	-	18%	13%	-	-	32%	29%	28%	-

"-" Less than 10%

Which of the following are the primary reasons you go to the spa? (Select up to three)



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* Convenience sample



Reasons for Not Visiting a Spa

Non-spa-goers

Reasons for Not Visiting a Spa

	Avg	Europe						Asia-Pacific			N. America		Internet Population*			
		Austria	France	Germany	Italy	Spain	UK	Australia	Japan	Singapore	Canada	USA	China	India	Russia	Thailand
Spas are very expensive	55%	55%	67%	43%	54%	56%	62%	52%	48%	67%	59%	65%	48%	49%	51%	56%
I don't have enough time to go to a spa	26%	29%	22%	24%	28%	35%	18%	22%	27%	29%	19%	18%	19%	27%	35%	31%
I don't know exactly what to expect in a spa	24%	28%	18%	31%	26%	26%	28%	26%	18%	29%	28%	29%	14%	26%	26%	12%
I don't know what services spas offer	19%	19%	23%	23%	16%	20%	16%	22%	22%	14%	17%	14%	17%	22%	21%	12%
Spas are not in a convenient location for me	18%	-	12%	25%	28%	17%	29%	25%	10%	17%	19%	21%	10%	20%	14%	21%
I would feel out of place in a spa	15%	14%	-	13%	13%	-	27%	25%	-	17%	23%	29%	14%	10%	12%	14%
Spas are just not for people like me	15%	11%	-	12%	11%	-	21%	18%	19%	14%	20%	22%	22%	19%	13%	12%
A hard sales approach during visit makes me uncomfortable	14%	14%	-	20%	-	-	-	-	-	36%	-	-	21%	-	21%	35%
Embarrassed others see me without clothing at spa	13%	12%	-	10%	10%	-	19%	16%	-	28%	16%	16%	11%	11%	-	18%
Uncomfortable with a male spa employee massaging/treating me	13%	10%	-	-	10%	-	11%	15%	-	25%	17%	19%	18%	13%	-	21%
Uncomfortable other people touch my body	10%	-	-	-	-	-	12%	14%	13%	23%	15%	15%	10%	14%	-	-

"-" Less than 10%

Which of the following has kept you from visiting a spa or has decreased the frequency of your visits?

* Convenience sample



About the International SPA Association

ISPA is recognized worldwide as the leading professional organization and voice of the spa industry. Founded in 1991, ISPA's membership is comprised of more than 3,200 health and wellness facilities and providers from 83 countries. ISPA advances the spa industry by providing invaluable educational and networking opportunities, promoting the value of the spa experience and speaking as the authoritative voice to foster professionalism and growth. For more information on ISPA, write to, call or e-mail: 2365 Harrodsburg Road, Suite A325, Lexington, KY 40504, USA Domestic Telephone: 1.888.651.4772 or Direct: 1.859.226.4326 or E-mail: ispa@ispastaff.com

About Research International

Research International is a world leader in custom market research services. Research International's worldwide network includes offices in more than 50 countries. Research International was founded in 1962 and is part of The Kantar Group, the world's largest survey research organization. Research International's extensive background in globally understanding consumers enables it to interpret the data it receives and to provide insightful analysis as to what the data means.



Disclaimer

Although the information in this update has been obtained from sources that Research International believes to be reliable, its accuracy and completeness cannot be guaranteed. This update is based on survey responses of respondents. This update is for information purposes only. All opinions and estimates included in this report constitute the views of survey respondents combined with our judgment as of this date and are subject to revision.

Surveys for this study were conducted by Research International during September/October, 2008. The survey was completed on-line by 15,000 respondents across 15 countries (1,000 per country). Estimates are by nature subject to error. Due to rounding numbers, sums may not add up to 100.

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