Summary of Canadian & United States' Consumer Attitudes and Motivators for Spa Vacations (2006) **

	CANADA	UNITED STATES
Total Who Have Ever Visited a Spa (in millions) (1) see footnote		
Total	6.3	57
Periphery (2) see footnote	2.4	19.5
Mid-Level (3) see footnote	3.2	31.1
Core (4) see footnote	0.7	6.4
Total Active Spa-Goers in last 12 months (in millions) (5) see footnote		
Total	3.7	32.2
Periphery	1.4	11
Mid-Level	1.9	17.6
Core	0.4	3.6
Female to Male Ratio of Spa-Goers		
Female	71%	69%
Male	29%	31%
Number of Spa Travellers (millions) (6) see footnote		
Total	1.8	20.4
Periphery	0.6	6.5
Mid-Level	0.9	11.1
Core	0.2	2.8
Female to Male Ratio of Spa Travellers		
Female	64%	64%
Male	36%	36%
General Spa Traveller Demographics		
Median Age	42	43
Median Household Income	$68K	$93K
College Grad or Higher Degree	63%	81%
Average Years of Spa Experience	5.0 years	6.1 years
Average Number of Overnight Trips/Year for Spa Experiences	1.1/year	1.1/year
Average Days of Vacation Planned/Taken for Spa Vacations	6.0 days	6.5 days
Season for most frequency in spa travel (7) see footnote	Summer/Winter	Spring/Summer/Fall

Summary of Canadian & United States' Consumer Attitudes and Motivators for Spa Vacations

CANADA		UNITED STATES	
Most Popular Recent Canadian Spa Destinations for Spa Vacations			
Ontario	35%	British Columbia	7%
British Columbia	26%	Ontario	4%
Quebec	12%	New Brunswick & Quebec	2%
Most Popular Recent US Destinations for Spa Vacations			
Florida	13%	California	32%
California	9%	Arizona	23%
New York	8%	Nevada	22%
Preferred Future Spa Destinations (8) see footnote			
Canada	45%	USA	68%
Mexico/Caribbean	39%	Mexico/Caribbean	31%
USA	30%	Europe	25%
Preferred Spa Facility Types frequented by Spa Travellers			
Resort/Hotel spa	73%	Resort/Hotel spa	81%
Day spa nearby	37%	Day spa nearby	23%
Destination spa	22%	Destination spa	21%
Most Popular Spa Treatments sought by Spa Travellers			
Massage	86%	Massage	88%
Body treatments	62%	Facial	51%
Facial	61%	Body treatments	51%
Manicure/Pedicure	57%	Manicure/Pedicure	48%
Pre-packaged services	27%	Fitness wellness services	22%
Other Popular Leisure Activities While on Spa Vacations			
Shopping	60%	Shopping	53%
Culinary travel experiences	54%	Culinary travel experiences	47%
Cultural attractions	44%	Cultural attractions	43%
Preferred Trip Planning Tools among Spa Travellers			
Friends/Family recommendation	63%	Website	62%
Website	58%	Friends/Family recommendation	60%
Spa/Travel guide books	35%	Spa/Travel guide books	33%
Past experience with the spa property or destination	30%	Past experience with the spa property or destination	32%
Travel agent	20%	Newspaper/Magazine articles	18%
Preferred Planning Websites			
Hotel or resort website	65%	Hotel or resort website	70%
Direct spa facility website	52%	Direct spa facility website	58%
Search engine travel websites	40%	Airline website	31%
On-line spa directories	28%	Search engine travel websites	30%
Country, state, provincial or city travel website	28%	On-line spa directories	26%

Summary of Canadian & United States' Consumer Attitudes and Motivators for Spa Vacations (continued)

CANADA		UNITED STATES	
% of Spa Travellers who make Travel Purchases over the Internet			
Airline tickets	40%	Airline tickets	63%
Accommodations	38%	Accommodations	56%
Car rental	21%	Car rental	40%
Spa services	19%	Spa services	22%
Package containing at least 2 of the above elements	18%	Tickets or fees for other leisure travel pursuits	16%
Trip Planning Considerations by Spa Travellers			
Started with the idea of a certain type of vacation experience	29%	Started with a desired destination in mind	37%
Started with a desired destination in mind	26%	Started with the idea of a certain type of vacation experience	27%
Looked for package deals without considering destinations, activities or travel experiences	14%	Started by considering certain specific activities that you wanted to do	11%
Most Important Benefits While on a Spa Vacation			
To relax and relieve stress	88%	To relax and relieve stress	88%
To get a break from your day-to-day environment	79%	To get a break from your day-to-day environment	81%
To be pampered	68%	To be pampered	63%
To healthfully renew/revive my mind, body and soul	61%	To healthfully renew/revive my mind, body and soul	57%
To have a life with no fixed schedule	63%	To have a life with no fixed schedule	53%
Spa Traveller Concerns with Spa Treatments			
Quality of treatment/services	35%	Quality of treatment/services	47%
Cost of services	36%	Cost of services	41%
Hygiene of staff and cleanliness of spa facilities	41%	Hygiene of staff and cleanliness of spa facilities	39%
Benefits of treatments	29%	Benefits of treatments	27%
Certification/Training of personnel performing treatments	25%	Certification/Training of personnel performing treatments	18%
% of Spa Travellers who belong to Loyalty/Affinity Clubs			
Frequent flyer program	72%	Frequent flyer program	88%
Retail store loyalty program	61%	Hotel/Car rental loyalty club	82%
Hotel/Car rental loyalty club	42%	Auto club	58%
Auto club	40%	Retail store loyalty program	52%
Magazine Preferences			
Food/Gourmet	49%	Travel	61%
Travel	49%	Food/Gourmet	50%
Health, fitness, well-living	48%	Business	49%
Fashion and beauty	42%	Health, fitness, well-living	47%
TV Programs Watched			
News	65%	News	64%
Travel	47%	Travel	51%
Cooking	44%	Cooking	42%
Radio Preferences			
Rock	44%	Rock	41%
Easy listening	43%	News talk	34%
Top 40	38%	Oldies	32%

**** Data in these tables are compiled from "Identifying the Spa Traveler: A Look at US and Canadian Consumer Attitudes and Motivators for Spa Vacations (2006); prepared by The Hartman Group for the Canadian Tourism Commission and the International SPA Association.**

(1) For these estimates, a "spa" is defined as an establishment that offers at least two of the following three kinds of services: full body massage, skincare treatments (such as facials), and body treatments (such as hydrotherapy or body wraps and scrubs). The Canadian and US population figures are based on adults aged 18 and older. The source of the Canadian population estimate is from Statistics Canada's key socio-economic database, CANSIM from October, 2005. Updated daily, CANSIM provides access to a large range of the latest and most up-to-date statistics available in Canada. The total Canadian population aged 18 and older is estimated at 25,297,520. The source of the US population estimate is from the Current Population Survey (CPS) data in December, 2005. The CPS is a monthly survey of about 50,000 households conducted by the Bureau of the Census for the Bureau of Labor Statistics. The total US population aged 18 and older is estimated at 218,330,850.

(2) The Periphery Spa Consumer

These are the consumers who frequently say "Wow!" whenever they enter well-run spas. They primarily expect indulgent and cosmetic services that make them feel special and look beautiful. They are fairly price sensitive, especially when considering untried services that don't affect their appearance. They make potentially fine distinctions in service quality within cosmetic services but only rarely in reference to other services (e.g. massage). Experiences and ambiance designed to please the Core consumer often become interpreted as mind-blowing indulgences to them. Periphery consumers are least likely to be approaching spas with the idea of health and/or wellness in mind. Instead, these consumers are seeking pleasurable experiences that are fairly "light" and carefree. Overall, they are fairly easy to please.

(3) The Mid-Level Spa Consumer

Moving away from a focus purely on the physical body and cosmetic appearance, Mid-Level consumers are more likely to be approaching spa-going as a wellness activity as they are just as interested in an emotional journey out of everyday existence, however brief. Therefore, spas appeal to their sense of a mind-body connection and offer these consumers unique ways to achieve balance. Mid-Level consumers spend more time in the isolation of treatment rooms than Periphery consumers, seeking out various forms of skin and body services. They are price sensitive primarily around the more esoteric services (e.g. exotic body wraps) and half day or all day packages, primarily because they have not fully integrated such services into their regime, finding many of them to be in the realm of indulgence. These consumers make finer distinctions than Periphery consumers concerning the interior design and ambiance of spas they patronize. They also have begun to question the backgrounds of potential new therapists and to evaluate the competency of prior ones. They actively spread "bad experience" narratives within their social networks.

(4) The Core Spa Consumer

Core consumers have essentially adopted spa-going into part of their regular health and wellness routine. For these consumers, spas provide opportunities in which they may holistically address their body, mind and spirit. For these consumers, spas represent a way of thinking as well as a way of living. Regardless of their unbridled enthusiasm and support of spas, these consumers are fairly difficult to please, because they value a very high quality transition experience (i.e. from arrival to treatment room). Even a bad arrival experience can be a deal-breaker for them. Courting their dollars requires thoughtful design, operational planning, staffing and ambiance that many spas don't, or simply can't afford, to offer. These consumers want to get work done at a spa, favoring some kind of ongoing transformation at much more than a physical level; a spiritual experience or transformation is not an uncommon expectation here. They investigate the backgrounds of their therapists and take nothing for granted. They ask lots of questions and expect thoughtful answers. Rarely are these consumers price sensitive. Finally, the habits and expectations of Mid-Level and Periphery spa-goers can be jarring to them and keep them from returning; this is especially true if a spa seems to cater to those outside the Core. Core consumers are typically evangelistic connoisseurs of spas and are looked to by Periphery and Mid-Level consumers as sources of expert opinion and influence.

(5) Active spa-goers are those who indicated going to a spa in the past 12 months.

(6) Making any spa visit while traveling within the past 12 months, whether or not it was planned, defines a spa traveller. While most of these spa visits are included in the spa-goer's travel plans, not all spa visits while traveling are planned. Some spa travellers merely take advantage of spa facilities at their travel destination after arriving.

(7) The spa experience, being primarily an indoor experience, can be enjoyed year-round. US spa travellers do not favour winter as much as the other three seasons. Canadian spa travellers do not show a marked preference across seasons.

(8) Canada ranks 4th as a preferred future spa destination by American spa travellers, ahead of Asia.