

STATE OF SPA REPORT 2023:

Do sustainability and
wellness matter?

in partnership with **SpaSeekers**

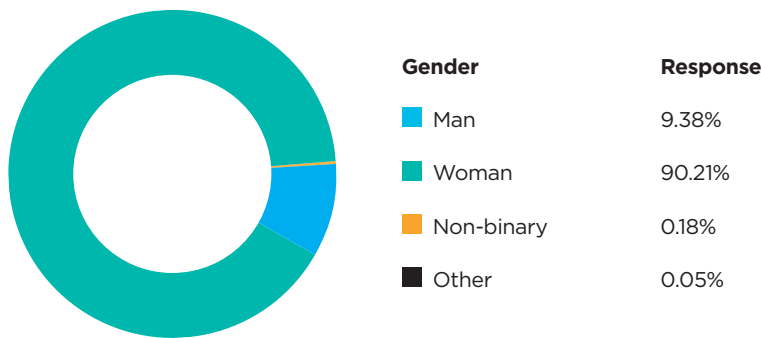
the
good
spa guide


SpaSeekers

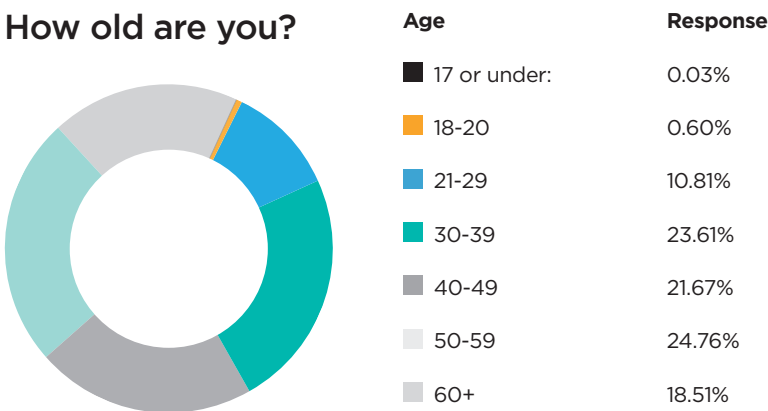
The demographics

We surveyed **8,827** people who use spas through Good Spa Guide or the SpaSeekers website. We looked at the data using three demographic splits: gender, age bracket and location. You can see the breakdowns below.

What is your gender?



How old are you?



Where do you live?



Welcome

This year we have two focuses for our white paper: the first is a look at how much people are willing to spend on their spa trips during a time of financial turmoil. The second focus is around some key industry buzzwords – sustainability and wellness – and how important they are to spa-goers when booking their spa time.

There is some good news and some surprising answers. More than two-thirds of people said they will spend the same or more on their spa time, despite shrinking household budgets. Good news for the industry. There were some slightly more challenging responses to the questions about the importance of wellness and sustainability, with most consumers saying that both concepts are nice to have, but don't influence their booking decisions.

The final questions look at how people feel confident – or not – during their spa time. Whether it's body confidence, sexuality, gender identity, or disabilities, we ask if they have ever felt uncomfortable at a spa. We also ask spa-goers the difficult question on gendered changing room use as the debate about gender identity becomes a key issue in our society.

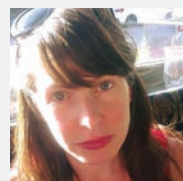
On the subject of how spa goers feel when visiting a spa, one question shows there is room for more inclusivity in the spa industry with 18% of people saying they were worried about going to a spa because of their body confidence. On the question of changing room use, most people (59%) wanted to see traditional gendered changing rooms, 35% wanted individual changing rooms and 3% suggested they would feel most comfortable in unisex changing rooms.

We hope this report gives you food for thought for your spa plans in 2023 and 2024. We also hope that this summer provides a busy season full of staycation goers exploring the best of British spas.

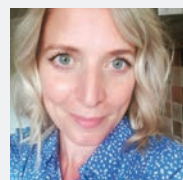
With love from all at Good Spa Guide.



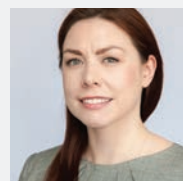
Rebecca Holmes
National Partnerships Manager
rebeccaholmes@goodspaguide.co.uk



Jo Gardner
Editor
jogardner@goodspaguide.co.uk



Natalie French
Marketing and Communications Manager
nataliefrench@goodspaguide.co.uk



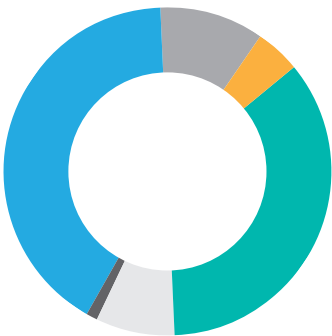
Caitlin Dalton
Director
caitlin@goodspaguide.co.uk

the
good
spaguide


SpaSeekers



What makes your decision to book one spa day over another?



Answer	Responses
I already know the spa I want to go to, there's no swaying me	4.43%
I look at the facilities for things like a swimming pool and relaxation space	34.32%
I look at the treatments – I have a favourite that I want to see	7.49%
I look for a specific product brand – I prefer their treatments and products	1.13%
It's about finding the right offer, I'm looking for real value for money	40.02%
I read up on reviews and ratings – especially Good Spa Guide ratings!	9.90%

There were **8,827** responses to this question. Across the demographics, 40% of people said they were looking for the right offer, and 34% of people said they are looking for the best facilities.

AGE:

The majority of respondents who already know the spa they want to go to are ages 30-39, 40-49, and 60+.

Respondents who consider facilities like a swimming pool and relaxation space tend to be in the age groups of 18-20, 21-29, and 50-59. The preference for specific treatments is more common among respondents in the age groups of 21-29, 30-39, and 50-59.

Reading reviews and ratings, particularly Good Spa Guide ratings, is more prevalent

among respondents in the age groups of 21-29, 30-39, and 50-59.

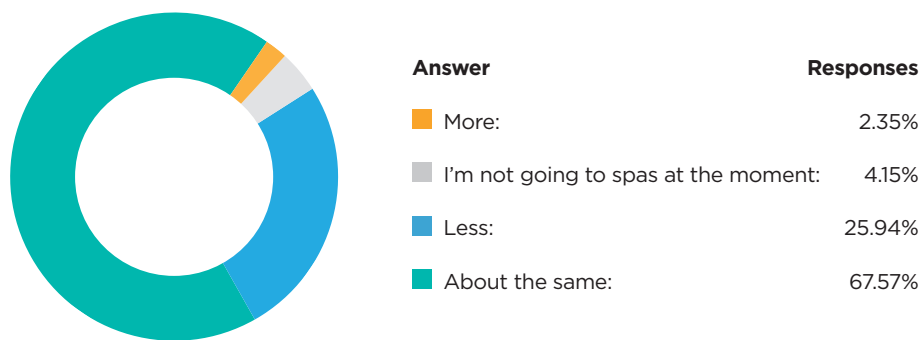
GENDER:

There is no significant variation in responses based on gender with only a 1% difference between women and men.

REGION:

Those in the East and London tend to prioritise the right facilities like a swimming pool and relaxation space when making their decision. Those in London, Wales and the North East tend to prioritise reading reviews and ratings. Those in the Midlands, the West, North West, South East, Scotland, Northern Ireland and South West tend to have a higher preference for finding the right value-for-money.

Thinking about the current economic climate, are you likely to spend less, more or about the same when booking a spa day?



Another question where there were **8,827** responses. Most people (68%) said they would spend the same amount booking a spa day, 26% of people say they would spend less, 2% said they would spend more and 4% said they are just not going to spas at the moment.

AGE:

The age brackets that are most likely to spend the same are 40-49, 50-59 and 60+. Ages 30-39 are most likely (43%) to spend less. The 60+ age bracket is most likely (5%) to spend more.

GENDER:

Women (62%) were slightly less likely to spend the same amount at spas as men (65%). Women are 5% more likely to spend

less, and there is no gender difference to spending more.

REGION:

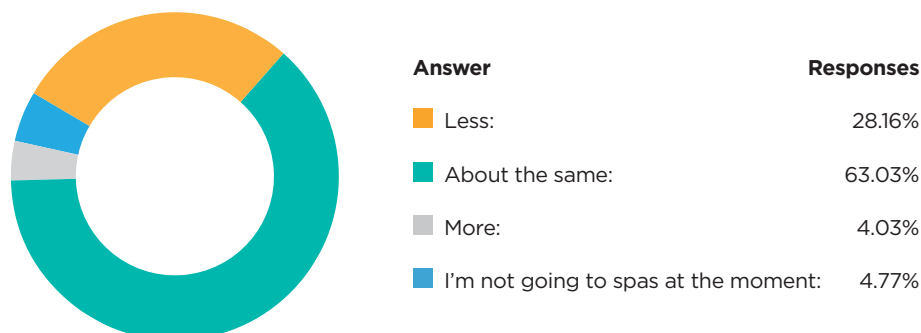
There are no regions that have a significantly higher likelihood to spend more on a spa day. Regions that have a higher rate of people saying they would spend less were the East, the Midlands, the North East, the North West, Scotland and Wales.

The regions that were most likely to say they would spend the same are London, the South East, the South West, and the West.

MOST PEOPLE (68%) SAID THEY WOULD SPEND THE SAME AMOUNT BOOKING A SPA DAY.

WOMEN ARE SLIGHTLY LESS LIKELY TO SPEND THE SAME OR MORE THAN MEN ON THEIR SPA BREAKS.

Thinking about the current economic climate, are you likely to spend less, more, or about the same when booking a spa break?



A full complement of people answered this question **(8,827)**. Nearly two thirds (63%) of people said they would spend the same on spa breaks, 29% said they would spend less, 4% said they would spend more and 5% said they are not going to spas at the moment.

AGE:

The older the age group, the more likely they are to spend the same with 71% of over 60s saying they would spend the same amount on a spa break. And vice versa, the younger the age group the more likely they are to spend less with 53% of ages 18-20 choosing this option.

The extremes of the age ranges were most likely to spend more on their spa break with 7% of the over 60s and 6% of 18-20-year-olds selecting this choice.

GENDER:

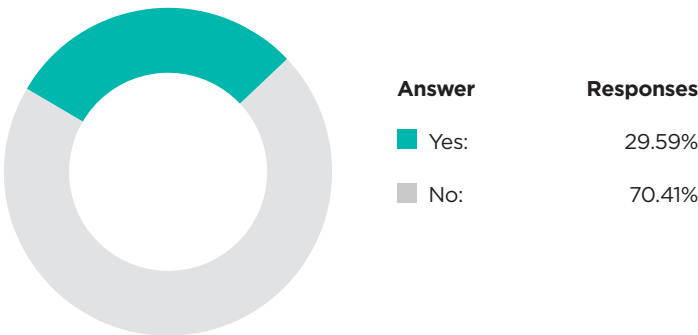
Women are slightly less likely to spend the same or more than men on their spa breaks, women were 4% less likely to stay the same and 3% more likely to say they will spend less. There was no gender difference in those who will spend more.

REGION:

London (7%) and the West (6%) were most likely to spend more on their spa breaks. The North East (28%), the North West (30%), Scotland (34%) and Wales (30%) were more likely to say they would spend less on their spa breaks.

The South East (69%) was the only region that was more likely to spend the same on their spa breaks.

Do you still consider Covid safety protocols when going to a spa? Such as wearing masks or regular hand washing?



There were **8,655** responses to this question with 30% of people saying they still consider Covid safety measures when going to a spa and 70% saying they do not.

AGE:

The younger age brackets are least likely to consider Covid safety protocols with 78% of people aged 21-29, and 79% of people aged 30-39 saying they are not likely to consider Covid protocols when going to a spa. The older age bracket is most likely to consider Covid safety protocols with 44% saying that it is still important to them.

GENDER:

Women are slightly more likely to consider Covid safety protocols than men, with women being 4% more likely to select this option.

REGION:

The regions with the highest percentages of people who still consider Covid safety protocols were the East (31%), Scotland (35%) and Northern Ireland (54%). The regions where people were the least likely to still observe Covid protocols were North East (73%), North West (72%), and West (74%).

30% OF PEOPLE SAID
THEY STILL CONSIDER
COVID SAFETY MEASURES
WHEN GOING TO A SPA.





45% OF PEOPLE SAID THEY WOULD PREFER TO ARRIVE AT A TIME THAT SUITS THEM.

Does having a specific arrival time matter at a spa?



Answer	Responses
I'm happy for the spa to give me an arrival time:	53.25%
I'd like to be able to arrive when it suits me:	44.81%

There were **8,819** respondents to this question. This question was relatively split with 53% of people saying they're happy for the spa to provide an arrival time and 45% of people saying they would prefer to arrive at a time that suits them.

AGE:
The younger the age bracket, the more likely they were to be happy with an arrival time provided by the spa with 79% of 18-20 years olds selecting the answer, decreasing to 50% of 60+.

GENDER:
Among gender groups, women had a lower percentage (44%) of individuals who preferred to arrive when it suits them, compared to men (48%).

REGION:
The regions with the highest percentages of individuals who preferred to arrive when it suits them were Wales (47%), London (48%) and the South East (47%).

The regions with the lowest percentages of individuals who preferred to arrive when it suits them were the West (36%), Northern Ireland (31%) and the North East (41%).

Does having a couple's treatment room matter to you when booking a spa?

There were **8,680** responses to this question, with the majority (80%) of people saying that a couple's treatment room did not matter to them when booking spa time.

AGE:

The younger the age range, the more likely they were to want a couple's treatment room. Those in the 18-20 (34%) and 21-29 (32%) age brackets were most interested in a couple's treatment room. At 50-59 and 60+ that figure decreases to 17% and 12% respectively.

GENDER:

Women were slightly less likely than men to want access to a couple's treatment room with only 18% of women saying yes it matters, compared to 35% of men.

REGION:

The regions with the highest percentages of individuals to whom a couple's treatment room does matter were the West (27%), London (24%), and Northern Ireland (33%).

The regions where most people indicated that having a couple's treatment room matters least were Scotland (14%), the South East (18%) and the South West (18%).



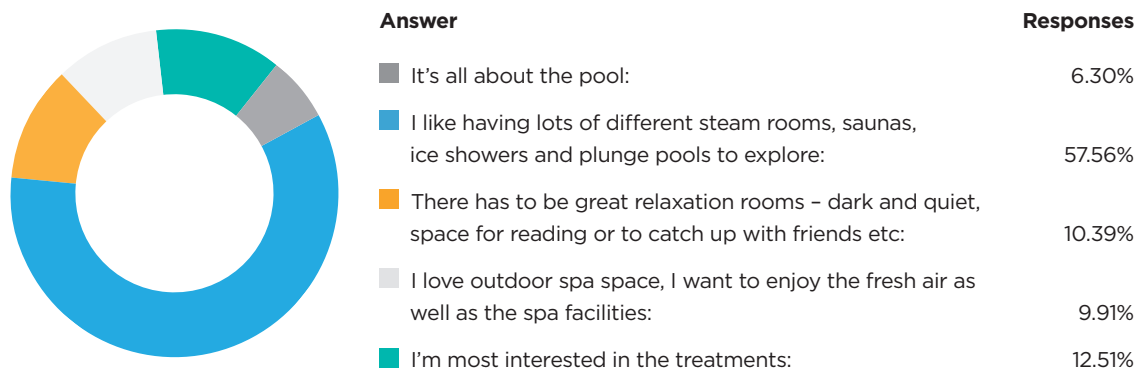
Answer	Responses
Yes:	19.3%
No:	80.7%



THE YOUNGER THE AGE RANGE, THE MORE LIKELY THEY WERE TO WANT A COUPLE'S TREATMENT ROOM.

ACROSS DIFFERENT REGIONS, THE
MAJORITY OF RESPONDENTS EXPRESSED
A PREFERENCE FOR THERMAL FACILITIES.

What spa facilities do you most want to see when booking your spa time?



Slightly fewer people, **8,694**, responded to this question. Overall, the most important facilities to respondents were thermal rooms (58%), the right treatments (13%), great relaxation rooms (10%) and outdoor spa space (10%). The facilities that mattered the least were the pool (6%).

AGE:

Individuals in the 40-49 age group showed the highest percentage (65%) of preferring lots of different steam rooms, saunas, ice showers, and plunge pools. Ages 60+ were the least likely to select thermal facilities at 44%.

GENDER:

Among the genders, women had a higher percentage (63%) of preferring lots of different thermal rooms compared to men (61%).

REGION:

Across different regions, the majority of respondents expressed a preference for thermal facilities.

The regions with the highest percentages of respondents who preferred thermal facilities were the East (68%), London (72%), and the Midlands (65%). The regions with the lowest percentages were Scotland (59%), Northern Ireland (52%), and Wales (55%).

How much does sustainability matter to you when booking spa time?



Answer

A little - it's a nice to have but I don't actively look at sustainability:	42.03%
A lot - it matters but wouldn't stop me from booking if the spa looked amazing:	26.89%
A moderate amount - it's one of the things I look for:	18.50%
Not at all - it isn't relevant to me:	7.48%
A great deal - I wouldn't consider booking a spa unless it has great eco-credentials:	4.73%

Responses

There were **8,686** respondents to this question. Most people (42%) responded saying that it matters to them 'a little - it's a nice to have but I don't actively look at sustainability'. Only 5% of people said that sustainability matters so much they 'wouldn't consider booking a spa unless it has great eco-credentials'.

AGE:

The 40-49 age group had the highest percentage (44%) of individuals who only considered sustainability a little and wouldn't actively look at it. The 50-59 age group had the highest percentage (32%) of individuals who considered sustainability moderately important and looked for it when booking.

GENDER:

Women showed a slightly higher percentage (27%) of considering sustainability to be of importance when booking spa time, compared to men (25%).

REGION:

The regions with the highest percentages of individuals who considered sustainability to be of little importance or wouldn't actively look for it were the East (52%), London (50%), and the Midlands (50%).

The regions where most people considered sustainability to be very important and wouldn't book a spa unless it had great eco-credentials were Scotland (45%), Northern Ireland (43%), and Wales (48%).



Do wellness options – from holistic treatments to mindfulness classes – matter when you book spa time?



Answer	Responses
A great deal – I wouldn't book a spa unless there are wellness options:	4.15%
A lot – it matters but wouldn't stop me from booking if the spa looked amazing:	13.95%
A moderate amount – it's one of the things I look for:	18.57%
A little – it's a nice to have but I don't actively look for wellness options:	48.01%
Not at all – it isn't relevant to me:	15.33%



There were **8,682** responses to this question. Most people (47%) said that wellness options matter 'a little – it's a nice to have but I don't actively look for wellness options'. Only 4% of people said they 'wouldn't book a spa unless there are wellness options'.

AGE:
The majority of respondents in all age groups indicated that wellness options mattered to them to a lesser extent when booking spa time.

The 40-49 age group had the highest percentage (46%) of individuals who only considered wellness options a little and didn't actively look for them.

The 50-59 age group had the highest percentage (42%) of individuals who considered wellness options a great deal and wouldn't book a spa unless they were available.

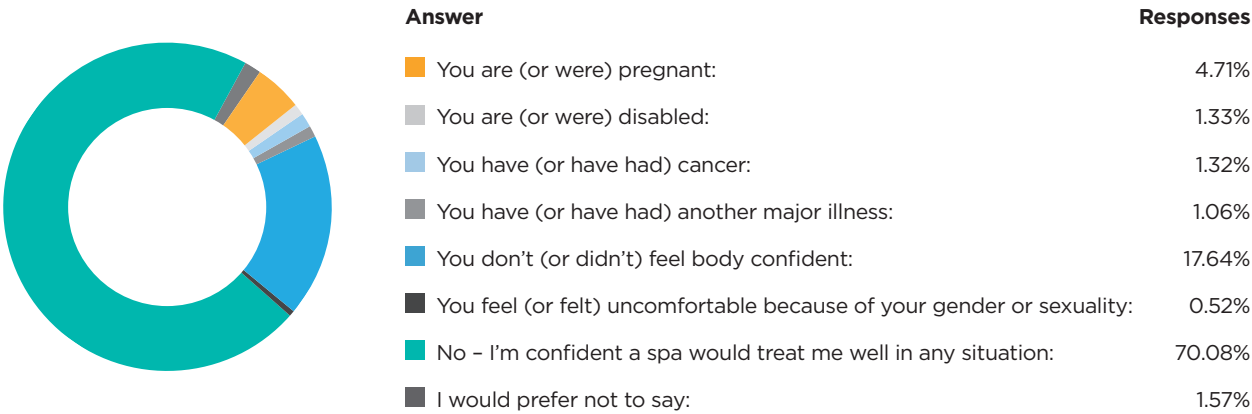
GENDER:
Women had a higher percentage (17%) of considering wellness options a great deal and wouldn't book a spa unless they were available, compared to men (13%).

REGION:
The regions where the highest percentages of individuals who considered wellness options only a little and wouldn't actively look for them were the East (17%), the South West (16%), and Wales (17%).

The regions with the highest percentages of individuals who considered wellness options a great deal and wouldn't book a spa unless they were available were the West (20%), Northern Ireland (15%), and Wales (13%).

A GOOD PROPORTION (18%) OF PEOPLE SAID THEY WERE WORRIED ABOUT GOING TO A SPA BECAUSE THEY DIDN'T FEEL BODY CONFIDENT.

Have you ever worried/doubted/decided not to go to a spa because...?



A total of **8,713** people answered this question. More than two thirds (70%) of people said that they were confident a spa would treat them well in any situation. A good proportion (18%) of people said they were worried about going to a spa because they didn't feel body confident. Some 9% of people said they had been worried about going to a spa because of another condition.

AGE:
Among the age groups, the 60+ age group had the highest percentage (77%) of individuals who felt confident that a spa would treat them well in any situation. The age group that was least confident a spa would treatment them well in any situation was the 18-20 age group (55%).

GENDER:
Men showed a slightly higher percentage (69%) of feeling confident that a spa would treat them well in any situation, compared to women (60%).

REGION:
In terms of regions, the highest percentage of individuals who felt confident that a spa would treat them well in any situation were in Northern Ireland (77%), the West (76%) and the East (72%). Those who had the least confidence a spa would treat them well were London, the North West, and Wales, all at 69%.

Thinking about changing spaces, do you want your spa to have...



Answer	Responses
Gendered changing rooms – men's and women's:	59.27%
Unisex changing rooms for all to use:	2.71%
Individual changing rooms:	34.96%

A total of **8,682** people responded to this question. Most people (59%) wanted traditional gendered changing rooms, 35% wanted individual changing rooms and 3% wanted unisex changing rooms.

AGE:

The people who wanted gendered changing rooms is consistently the highest response across the age brackets from the highest among 18-20-year-olds (62%) to the lowest among 60+ year olds (57%).

For individual changing rooms, the age brackets with the highest percentage of people who selected this answer is again 18-20-year-olds at 38% and this option was least popular with 21-29 and 30-39 year olds at 32% for both.

The age brackets that were most likely to select unisex changing rooms were 21-29, 30-39- and 50-59-year-olds, all at 3%. No 18-29-year-olds selected the unisex changing rooms option.

GENDER:

Women were slightly more likely than men to want gendered (1% more) or individual (14% more) changing rooms. They were also less likely to consider unisex changing rooms (10% less).

There was still a strong preference for individual changing rooms among people who identified as non-binary or another gender with 54% selecting individual changing rooms, 32% selecting gendered changing rooms and 5% selecting unisex changing rooms.



REGION:

Among the regions, Northern Ireland (69%) and the Midlands (60%) had the highest percentage of respondents opting for gendered changing rooms, with Scotland (52%) and Wales (57%) being the lowest.

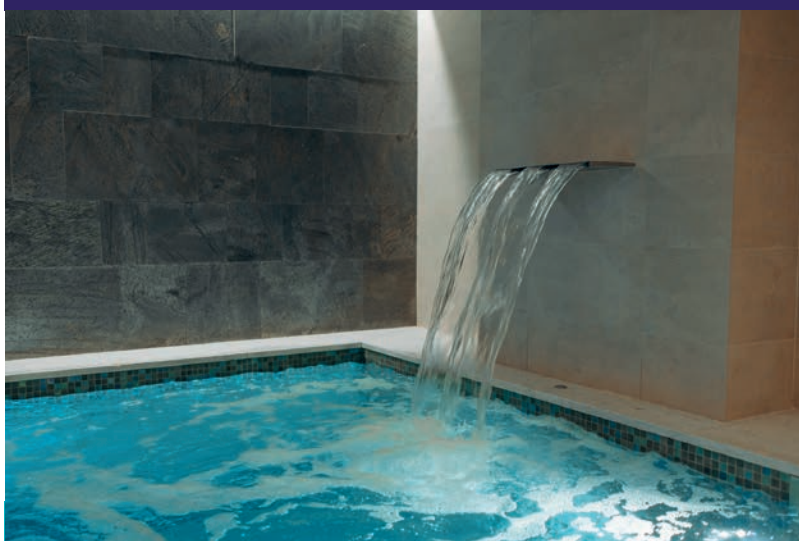
For individual changing rooms, London and Scotland (both at 38%) had the highest percentage of respondents selecting this choice with Northern Ireland (23%) and the West (26%) being the lowest.

The choice of unisex changing rooms was very similar across the board with all regions choosing this option between 2% and 3%.



SpaSeekers

We are the UK's longest-standing spa booking agency with one aim: to find customers the perfect spa experience using specialist knowledge and award-winning customer service.



From humble beginnings in a garage - with a just dozen spas in tow - to turning 30 in July 2019 with 500 spas on our books, our drive to grow shows no signs of abating. Last year we drove £15m in spa revenue to our UK-wide suppliers.

There have been many ups and downs along the way, but SpaSeekers HQ now boasts its best-ever team, from exceptional Spa Booking Advisors and dedicated Group Booking Advisors to a fantastic Marketing Team.

Right from the start our service has been based on free bookings; our advice on first-hand experience. We are forever

developing our website to make the customer experience as stress free, user-friendly and helpful as possible.

As the exclusive provider of spa experiences for 33 million Tesco Clubcard customers - as well as the nominated provider of spa experiences for o2 Priority, which covers a customer base of around 17 million - we continue to make spas more accessible for more people, more of the time.

With new spas joining us each week, customers are never short of inspiration on spas to book - or packages to choose - be it for themselves or a pampering gift for a loved one.

SpaSeekers.com was established in 1989. We showcase the most comprehensive selection of UK spas and packages that appeal to the widest audience. Our free booking service, exclusive spa deals and easy-to-use website make us the leading supplier of UK spa experiences. We're also the exclusive provider of spa experiences for 33 million Tesco Clubcard customers as well as the nominated provider of spa experiences for o2 Priority, which covers a further customer base of around 17 million.



www.goodspaguide.co.uk