

SA's spa market up 13%, but premium demand seeks slower, personalised care

The global wellness economy is expanding rapidly, with spa and wellness tourism emerging as one of its fastest-growing categories.



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In South Africa, the sector is showing similar momentum, with industry data from ProBeauty indicating 13% growth in the local spa market during 2024.

On the surface, the numbers point to a thriving industry. Look deeper, however, and a more nuanced reality begins to emerge.

Much of the growth is concentrated in high-volume, convenience-driven services such as express massages, lunchtime facials and quick wellness treatments designed around speed and accessibility. While this has democratised access to wellness, it has also created a widening gap at the premium end of the market.

Increasingly, discerning wellness consumers are searching for something slower, more intentional and emotionally intelligent — experiences built around restoration rather than rapid turnover.

Wellness shifts from transaction to transformation

Monique Pereira, spa manager at Steenberg Spa, believes parts of the industry are drifting toward transactional wellness models that prioritise efficiency over meaningful connection.

“Transactional wellness is increasingly evident in parts of the industry,” says Pereira. “However, this risks treatments becoming quick fixes rather than intentional experiences. True wellness is rooted in care, connection and presence, and cannot be rushed.”

The shift reflects a broader global evolution in consumer expectations.



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Across international luxury wellness brands, the focus is increasingly moving away from isolated spa treatments toward integrated wellbeing journeys built around longevity, mindfulness and personalised care

Global portfolio, Six Senses has positioned wellness as a holistic lifestyle ecosystem, offering tailored programmes designed to encourage deeper engagement and slower living. Similarly, SHA Wellness Clinic has built its reputation around preventative, multi-day wellness programmes focused on long-term health outcomes.

Locally, The One&Only Cape Town Spa reflects a similar philosophy locally, prioritising immersive, multi-step wellness journeys centred on rest, privacy and restoration rather than high-volume treatment through

Meanwhile, Santé Wellness Retreat & Spa in Paarl continues to grow demand for extended wellness stays that combine holistic therapies with personalised wellbeing programmes.

Personalisation becomes the new luxury

The movement toward bespoke wellness experiences is not simply anecdotal.

Research from McKinsey & Company shows that 88% of consumers now believe personalisation matters much as — or more than — it did previously.

That expectation is fundamentally reshaping the wellness landscape.



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Consumers increasingly want experiences tailored not only to their physical needs, but also to their emotional state, stress levels and lifestyle realities.

Yet many wellness operators continue to prioritise scale, repeat turnover and operational efficiency above emotional engagement.

While commercially rational, that approach carries risk.

“When pace increases, presence decreases,” Pereira explains. “The ability to truly connect with a guest is compromised. That is where the essence of wellness begins to erode.”

Burnout culture is changing consumer behaviour

The rise of slower, immersive wellness experiences is also closely linked to broader societal shifts.

In an era shaped by burnout culture, economic pressure and always-on digital lifestyles, wellness is increasingly viewed less as an occasional indulgence and more as an essential lifestyle investment.

Consumers are actively seeking spaces that allow them to disconnect, recalibrate and recover mentally as much as physically.

The Global Wellness Institute notes that consumers are increasingly prioritising mindfulness, mental wellbeing and longevity-focused experiences over superficial treatments.



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This changing mindset is redefining what value means within the wellness sector.

Privacy, emotional intelligence, intuitive service and authentic human connection are becoming central differentiators in the premium spa market.

Depth over scale

At Steenberg Spa, this philosophy has translated into a deliberately slower and more bespoke operational model.

Rather than optimising for maximum throughput, the spa focuses on highly personalised experiences that adapt dynamically to each guest's emotional and physical needs.

“In practice, it means the guest never feels processed,” Pereira says. “From arrival to departure, the journey is curated. Personalisation goes far beyond adjusting pressure or product — it's about understanding the guest holistically.”

This approach highlights a growing divide emerging across the wellness economy.

On one side sits convenience-led wellness designed for accessibility and speed. On the other is experience-led wellness focused on depth, emotional resonance and long-term behavioural change.

Both models can coexist successfully, but they serve increasingly different consumer needs.

The future of wellness will be emotional

The broader challenge for the industry is whether operators can evolve beyond standardised treatment menus into truly experiential wellness ecosystems.

For premium brands especially, success will likely depend less on volume and more on authenticity, consistency and emotional intelligence.

“Guests are perceptive and able to sense if something is genuine versus performative,” Pereira concludes.

“The brands that will resonate are those that prioritise meaningful connection over volume.”

As the global wellness economy continues its rapid expansion, growth alone may no longer be the most meaningful indicator of success.

In the premium wellness space, the real competitive advantage increasingly lies in creating experiences that feel human, restorative and emotionally real.

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