

Spa Quality Standards Consumer Research



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Background and Objectives

With an increased demand for and supply of establishments offering spa products and experiences, the spa industry in the UK and Ireland is in a crucial stage of its current development process. However, at the moment there is a lack of independent, clear quality standards, which are *'accepted by the industry and understood by the consumer'*. A group of stakeholders (VisitBritain, the Spa Business Association and the British International Spa Association) has therefore come together to develop a programme of quality standards. An important part of this process is to develop quality standards, which are based on consumer research. Consequently, TNS Travel & Tourism, an independent research agency was commissioned to conduct a research project with the *'aim to assess consumers' needs, understanding, awareness and experience of spas in the UK and Ireland.'*

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Considering the topic of this research, it was decided that a qualitative approach was the best suited to provide an in-depth understanding as to the awareness and experience of spas in the UK and Ireland. A two-stage qualitative methodology was adopted for the conduct of this research programme.

Stage 1: Focus groups

The first stage of research involved the conduct of six focus groups with spa users during January 2005. A variety of lifecycle groups were included in this research, the reason being that there are many different types of spas and treatments, which are likely to appeal to consumers from various stages in life. All focus groups were conducted with consumers from the ABC1 social classes, as they are more likely to use spas and represent the market with most potential.

The focus groups were undertaken in London, Birmingham and Newcastle and one group was undertaken with male spa users. Each focus group lasted for approximately 1.5 hours.

Stage 2 – Case Studies

The purpose of the second stage of the research programme was to explore further some of the issues raised in the first stage of the research, particularly in relation to the development of a quality standards scheme. It involved conducting five 'case studies' at a

variety of spas throughout the UK including Ragdale Hall, Center Parcs, Dalhousie Castle, Amida and Nirvana. A total of more than 40 in-depth interviews were undertaken with users of these spas. On average, each depth interview lasted 15-30 minutes.

Key Findings

Spa Experiences: Overall, there were relatively high awareness levels of different types of spas. Respondents in the focus groups and depth interviews also had a wealth of experience of these types of spas. The main types of spas mentioned in the discussions were as follows: health farms/health spas, day spas, spas in gyms and clubs, hotel spas and overseas spas, including those on cruise ships. It is interesting to note that not one respondent used the term 'destination spa', which is used by the UK spa industry to describe health farms, health resorts in the UK.

Main Motivations: The primary reasons cited by respondents for visiting spas were to relax and unwind from the pressures of work and day to day life and also to be pampered:

"We don't get much time to ourselves, to look after ourselves, so it's a bit of a pamper day."

"Total relaxation. Total switch off and plus it definitely helps tone and make you think about a healthy diet."

"I just come to unwind and for relaxation...and to be spoiled."

Health and physical well being reasons were also relatively important but more so on a secondary level to relaxation and pampering. To have quality time and for a special treat or occasion were also mentioned as key motivations for visiting a spa.

Information Sources: It was evident that informal information sources, in terms of word of mouth recommendations from friends and relatives and previous visits were most influential in encouraging respondents to visit a spa. Formal or published information sources, particularly the internet, spa websites and adverts in magazines and newspapers were also used but were typically of a lesser importance than word of mouth recommendations or previous visits. It was more likely to be the case that after someone had received a recommendation for a particular spa they would be prompted to find out more about the spa, for example on their website.

Most Positive Experiences: The most positive spa experiences were to be found at spas where there was a relaxed atmosphere or ambience and a high level of customer service from staff.

" You felt relaxed from the moment you walked through the door."

"The staff are very warm and welcoming yet professional...it just makes the whole experience."

The location and surroundings were also an important element of the spa experience, with high levels of satisfaction more likely to be found at those spas in rural and tranquil settings. In these spas, respondents were likely to feel relaxed and away from the hustle and bustle of everyday life. Other factors contributing to an enjoyable spa experience were good quality food, accessibility, a variety of treatments, classes and facilities on offer, space to relax, good quality of accommodation and value for money.

Dislikes: Respondents were then asked to describe any negative experiences at spas. It is important to note that although a number of negative experiences were discussed, most were mentioned by relatively few respondents. The main type of negative experience was where users felt very rushed during their treatments, the spa was too busy and they were treated in a business like manner. In several instances these spas were likened to a 'conveyor belt' or 'production line'. Other complaints highlighted included, unfriendly staff and specific equipment of facilities not in operation.

Awareness of Quality Standards: There were very low awareness levels and much uncertainty about any rules and regulations and the existence of quality standards in the spa industry in the UK:

"I'd like to think they are inspected. Whether they are or not is another matter."

Would you use a quality standards scheme?: Overall the majority of respondents in the research were of the opinion that the introduction of a quality standards scheme would be beneficial. In particular, they felt it would provide an indicator of how spas compared against each other as well as identify the 'genuine' spas.

"It's like Corgi....if it's upheld, if it's a recognised industry standard and it means something then yes I would definitely pick one of those over another"

"You want to be assured that they know what they are doing"

"Like a lot of businesses, people get in and they are very good, medium and then you get the rogues. The rogues jump in just to make the money. You don't want that."

Amongst those who were unsure of the value of such a scheme, there were some concerns it could increase prices, particularly those with higher ratings. A few respondents also acknowledged the difficulty of comparing different spas therefore they believed the success of such a scheme would very much depend on the criteria used for grading. It was also mentioned that any spas included in a rating scheme would need to be checked on a regular basis to ensure that standards are upheld.

Importance of including aspects in a scheme: All respondents were presented with a list of aspects of a spa and asked to indicate which they considered to be most important to include in a quality standards scheme. The most important aspects identified were the standard of cleanliness, warmth, helpfulness of staff and noise levels/tranquillity. Also identified as significant to be included in any quality standards scheme and in order of importance were the following aspects:

- Qualifications/experience of therapists
- Overall atmosphere
- Health and safety
- Range of treatments available
- Reputation
- Cost/value for money
- Range of facilities/equipment available
- Standard of premises in terms of furnishing, décor, style
- The space to relax
- Availability of 'extras' (towels, robes, slippers etc)

The least important aspects identified were childcare/crèche facility availability, other activities outside the spa, type of facilities (e.g. mixed, family friendly), presence of medically qualified staff on the premises, the use of natural spa water in treatments and the number of therapists.

Quality standards scheme based on 1-5 stars: The majority of respondents were not in favour of this type of quality standard scheme for several reasons. Firstly, there was some concern that this type of scheme was more likely to be based on size with those spas with more facilities likely to achieve higher grades. Indeed, a significant number of respondents stressed that '*bigger is not always better*' and a small spa should be able to achieve a high rating. Secondly, it was felt that a star rating system tended to imply that those with 1 or 2 stars were of a poorer quality and were therefore relatively unappealing to consumers:

"I don't think anybody would want to go to a 1 or 2 star spa for starters so I don't think there is really much point."

Amongst those who were in favour a star quality standards scheme, the main reason given was that as it is similar to the quality standards scheme used in the hotel sector they were more likely to be familiar with such a scheme.

Quality standards accreditation scheme: Overall, a higher proportion of respondents were in favour of an accreditation scheme whereby spas would need to fulfil a basic set of standards to call themselves an accredited spa. The main reason for selecting this type of

quality standards scheme was that it provided a reassurance that all spas in the scheme had met a basic set of standards.

"This would mean more to me...I would know they've met these standards. It's like Investors in People where you have to meet them and you know them"

"That's got to be the minimum so any of these providing they're on that baseline, they'll be OK and then it's up to you whether you want to go further up"

It was also recommended by a significant proportion of respondents that further information on individual spas, for example, the types of facilities on offer would also be very useful to have information on addition to if a spa was accredited or not. Furthermore, it was generally the opinion that including additional awards over and above the basic accreditation would add value to the scheme. Respondents suggested these awards could be given to exceptional spas or those which offered a very high standard in a particular area such as the quality of food or treatments