

# 6

# Principles and Practices of Spa Consumer Behaviour

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## Introduction

The spa industry is complex and multifaceted, encompassing a variety of markets, each with specific consumer behavioural characteristics (SRI, 2008; Beattie, 2011). Spa consumer behaviour research is still in its infancy, and to date there remains a need to develop a deeper understanding of consumer behavioural characteristics. This chapter provides students with an understanding of the principles of consumer behaviour as applicable to spa consumers. The chapter begins with a discussion on the current and emerging regional patterns of demand for spa, discussing some of the key stimulants. It then moves on to highlight the challenges in identifying types of demands for spa. The chapter then presents and discusses the main concepts of consumer behaviour in spa, including key models derived from related disciplines of marketing, business, tourism and hospitality, which can be used to understand the complexities of spa guests' behaviour. The chapter concludes with a discussion on how the understanding of consumer behaviour in spa is vital for marketers and business operators alike.

## Regional patterns of demand in spa and key stimulants for growth

In this section we look at current regional patterns of demand in spa. In so doing we aim to begin unpacking some of the reasons behind the demand differentiation and fragmentation of the spa products and practices encountered today. The latest report produced by the Global Wellness Institute (GWI, 2014) highlights how Europe, Asia Pacific and North America account for 86% of the world's spa markets. Europe, with its history of therapeutic bathing and wellness traditions dating back Roman and Greek civilisations, is considered to be the largest and most mature regional spa market in the world. It primarily services a demand for preventive, therapeutic, curative and rehabilitative services, many of which are built around or complement thermal and mineral springs resorts (SRI, 2007; GWI, 2014). The industry accounts for an estimated 25,000 spa facilities, generating a €20 billion turnover. The region directly employs 500,000 people and supports an additional 1.2 million jobs in related fields (Beattie, 2011). The Asia-Pacific market is currently the second largest market after Europe in terms of spa revenue, with an estimated €18.8 billion turnover. Yet the region now surpasses Europe in terms of the number of operating spa businesses, with a further potential for growth as more and more traditional wellness practitioners cross over into the spa market (SRI, 2007; GWI, 2014). Spa demand is predominantly made of international tourists staying in hotels, resorts and destination spas, pursuing wellness, health preservation and promotion, and increasingly interested in culturally-based healing and wellness therapies, such as Ayurveda, Thai and Chinese massages and Aboriginal treatments.

Growing international demand is also directed towards medical tourism facilities, combining health treatments with recuperation, healing and convalescence-specific spa treatments. Domestic demand for day/club/salon spas continues to grow in middle and upper income countries, such as Japan, Korea, Hong Kong, Singapore, Australia, and New Zealand (SRI, 2007). However, it is worth noting how similar trends are being registered in relatively newly industrialised countries, such as China and India (GWI, 2014).

Incorporating two well-established markers such as the USA and Canada, the North American spa industry, with 20,660 spas and \$13.5 billion in revenues, currently ranks third in terms of revenues and in the number of spas. Although traditional demand concentrates around day/club/salon spas and hotel/resort spas, new industry segments and new business models continue to emerge in both countries. The GWI (2014) report mentions an increase in demand for spa services offered on the premises of a customer's home or office, as well as demand for cruise ship spas.

Finally, fast growth is registered in regional markets such as the sub-Saharan Africa and South America spa markets; a growth that arguably exposes well

the societal changes underway in those regions. Broadly speaking, notions of differentiation and internationalisation of demand in spa can be ascribed to macro-economic, technological and socio-cultural changes which, gathering pace towards the latter part of the last century, continue to impinge upon the global spa industry today (see Table 6.1).

At a simple level, globalisation, understood here as a contemporary growth in goods and services, information communication, people and cultures' mobility across frontiers, can be seen as problematising the current industry trends and spa consumption activities we observe today. For example, the proliferation across the globe of products such as Garra rufa fish spas, Hamman experiences or even hot stone massages, reflect an increased tendency towards cultural homogenisation and standardisation of the spa offer. Yet, simultaneously, globalisation can be seen as a major enabling force behind these changes, for example fuelling global demand for once cultural-based, locally-specific traditions and practices such as Indian Ayurveda (Azara and Stockdale, 2012). As spa as a concept and experience becomes an integral part of consumers' everyday life and consumers become more discerning, greater demands are placed on businesses and destinations to offer new and unique local practices capable of stimulating consumers' senses and desires. As Suzie Ellis, founder of SpaFinder, said "There is no more powerful consumer trend across the developed world than the hunger for all things authentic and indigenous, impacting what we now most want to eat [...], to where we most want to travel" (Spafinder Wellness UK, 2015).

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Increases in disposable income
Growth of global middle class (especially in emerging economies such as China, India, Russia, Brazil, etc.)
Advances in technology and improved scientific research dealing with health and appearances and quality of life
Ease and availability of travel
Increased in leisure time
Increased democratisation of health access
Ageing population and rises of lifestyle diseases
Economic recessions in traditional markets and expansions into new ones
Threats of global pandemics
Growth in specialised intermediaries/ suppliers
Differentiation of offers/ products, services
Improved presentation of the product/ increased importance of semiotic
Increase in consumer culture and de-differentiation of cultural spheres leading to the incorporation of spa as everyday practice

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**Table 6.1:** Macro factors fuelling differentiation of demand for spa