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The International SPA Association
Lexington, Kentucky
voice: 888.651.ISPA
fax: 859.226.4445
www.experienceispa.com/ISPA/

Conducted by
The Hartman Group, Inc.
1621 114th Avenue SE, #105
Bellevue, Washington 98004-6957
voice: 425.452.0818
fax: 425.452.9092
email: info@hartman-group.com
www.hartman-group.com



**ISPA 2006
Consumer
Report:
Spa-goer and Non-Spa-
goer Perspectives**

*PREPARED FOR
THE INTERNATIONAL SPA ASSOCIATION*

SEPTEMBER 2006

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Preface

About the International SPA Association

ISPA is recognized worldwide as the leading professional organization and voice of the spa industry. Founded in 1991, ISPA's membership is comprised of more than 2,700 health and wellness facilities and providers from 75 countries. ISPA strives to advance the professionalism of the spa industry by providing invaluable educational and networking opportunities, to promote the value of the spa experience to society, and to be the authoritative voice of the spa industry.

For more information on ISPA, write to, call or e-mail:
2365 Harrodsburg Road, Suite A325, Lexington, KY 40504, USA
P: 1.888.651.4772 or 1.859.226.4326; F: 1.859.226.4445
www.experienceispa.com
E-mail: ispa@ispastaff.com.

About The Hartman Group

The Hartman Group, founded in 1989, is a full-service consulting and market research firm offering a wide range of services and products focused on health and wellness consumer understanding. We specialize in the analysis and understanding of consumer lifestyles, uncovering why consumers shop and purchase wellness products and services, and identifying opportunities that can be derived from these behaviors.

Disclaimer

Although the information in this report has been obtained from sources that The Hartman Group believes to be reliable, its accuracy and completeness cannot be guaranteed. This report is based on consumer responses to surveys and face-to-face interviews conducted in 2005 and 2006. This report is for information purposes only. All opinions and projections included in this report constitute the interview respondents' and The Hartman Group's judgment as of this date and are subject to revision. Forecasts are subject to uncertainty and evolving trends: actual results may vary from forecasted or projected results.

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*Spas are entities devoted to enhancing overall well-being through a variety of
professional services
that encourage the renewal of mind, body and spirit.*

Executive Summary

As a follow up to the *ISPA 2004 Consumer Trends Report: Variations & Trends on the Consumer Experience*, the International SPA Association commissioned The Hartman Group to conduct quantitative and qualitative research to gain greater understanding of the spa-going and the non-spa-going consumer in the US and Canada. With the exception of Chapter II, this report is based on the qualitative research conducted by The Hartman Group.

A main focus of the qualitative research was on gaining an understanding of consumer perceptions and expectations of spas across four types: day spa, destination spa, resort/hotel spa, and medical spa. In order to understand product consumption as well as services, particular attention was given to understanding consumer perceptions of spa products in the spa environment. Given that spa-going is not a mainstream feature of North American life, we explored non-spa-going consumer lifestyles to understand the underlying barriers to spa involvement.

Defining the Spa World

The World of Spas is a shorthand way of referring to all of the individuals and businesses that use, maintain, manage, support or otherwise deal with spas. The notion comes from a generalized model of consumer behavior designed to understand the attitudes and behaviors of consumers engaged in a given set of activities. In this case, the set of activities are those normally associated with spas. There are three categories of spa-goers (the two extremes of high and low involvement and the middle ground) who constitute three distinct segments of the Spa World. We refer to these segments as **Core** (most involved), **Mid-level** (somewhat engaged) and **Periphery** (least involved) spa-goers.

The defining characteristics of each segment were first identified through in-depth ethnographic and qualitative research conducted for ISPA in 2004.¹ Central to these differences is the degree to which consumers approach their spa experiences as part of a holistic, long-term orientation to

¹ ISPA 2004 Consumer Trends Report: Variations & Trends on the Consumer Spa Experience is available at www.experienceispa.com.



health and well-being (i.e., Work) rather than a form of Escape or Indulgence. Core spa-goers view their treatments and experiences at spas as part of a larger wellness lifestyle, and even though they are not above being pampered, their main perspective of spas is in relation to health and wellness (Work). By way of contrast, Periphery spa-goers see their time at spas as Indulgence (though perhaps necessary to balance an otherwise stressful life). For the most part, Periphery spa-goers have not made strong connections between their spa visits and their health and wellness. Mid-level spa-goers fall somewhere between these extremes, with some of their spa experiences purposely linked to wellness pursuits and others decidedly intended purely as an Escape or Indulgence. These motives, Work, Escape, and Indulgence, can be interpreted as spa drivers.

Major Themes

The major themes that echo throughout this report include:

- imagery of spas as havens
- spa-goer confusion around spa distinctions
- the necessity for spa experiences to be fully guided and psychosocially safe
- the desire for customization of spa experiences and environments
- spa-goer perceptions of spas as service rather than retail environments

A major theme that emerged from studying the non-spa-goer is their similarity to spa-goers in that they both orient to the spa drivers Escape, Indulgence, and Work but the non-spa-goer is more self-sufficient in satisfying these needs.

The following key findings and recommendations are taken from the body of this report.

The Size of the Spa World

- About fifteen percent of the adult consumer population in Canada (14%) and the U.S. (15%) have received services from a spa within the past 12 months
- Participation in the Spa World assumes greater importance in the lives of consumers as they move from Periphery to Core
- Consumer evolution into the Spa World typically entails information gathering, experimentation, evaluation and lifestyle negotiation. Thus, not only do few spa-goers enter the world at the Core, but migration towards the Core is an evolutionary process that takes years to achieve
- Fewer than 10% of U.S. or Canadian spa-goers indicate being extremely comfortable with being shown spa products for purchase, waiting for a treatment and expressing concerns regarding a visit

Spa-Goer Perceptions of Differences among Spa-Types

Day Spas

- Day spas serve as the spa model against which all other spas are compared
- The proliferation of day spas across urban landscapes means that multiple images abound in the minds of spa-goers
- Most spa-goers maintain an experimental approach to day spa-going (i.e., they want to see what else is out there)
- Time pressure is the most common issue detracting from experiential value of day spa visits as spa-goers feel internal pressure to get back to their daily obligations
- There is an emerging quality continuum for day spas

Destination Spa

- Spa-goers tend to equate destination spas and resort/hotel spas in their minds
- Many spa-goers want help linking the intentions of their destination spa visits to their everyday lives
- Mid-level and Periphery spa-goers seek life-altering changes at destination spas
- Core spa-goers seek lifestyle tune-ups and exposure to latest trends at destination spas
- Escape is a strong motive to visit destination spas but social and economic pressures there often undermine a spa-goer's ability to Escape

Resort/Hotel Spa

- Vacationing and business traveler spa-goers do not typically organize their trips around resort/hotel spa visits. Primary motives in trip selection generally include the location/destination and accompanying experiences
- Perception that resort/hotel spas are expensive leads to expectations of high quality experience and risk of poor value
- Spa-goers are especially drawn to indigenous treatments and practices at resort/hotel spas
- Outdoor treatments are especially alluring to vacationers for whom vacation means "being outside"
- Business travelers want spa experiences that are removed from vacationers and vacation culture

Medical Spa

- Many spa-goers maintain unfavorable and inaccurate images of medical spas
- Medical spas often seen as “last resorts” for attaining physical states that are seemingly unachievable through conventional spa treatments
- Medical spa treatments are perceived as posing short-term risks and long-term unanticipated consequences
- Newbies to medical spas contemplate and anticipate “getting Work done” at a medical spa for quite some time before committing to the process
- Medical spas are perceived and experienced as high sales pressure environments

Spa-Goer Perceptions of Nuances of the Spa Experience

Transitioning Into the Spa Experience

- Spa-goers on all levels strongly expect that their entire spa visit will be tightly structured. This is especially true during transitional points in their visits, when many spa-goers regularly experience feelings of uneasiness
- Spa-goers typically feel most “settled in” to a spa visit during the early stages of their treatments
- Being “transported” out of normal waking consciousness is a key marker of a quality spa visit
- **Trend:** Mid-level and Core spa-goers value opportunities to customize their spa visits as much as possible to their specific tastes and desires
- **Trend:** Services that are on the horizon include: microdermabrasion, spa time for mother and baby, spa services for preadolescent children (e.g., spa birthday parties)

Common Problems During a Visit

- Treatments often end on awkward notes due to ambiguous language of therapists/technicians
- Spa-goers take “tipping” for granted but spas very often mismanage the tipping process
- Spa-goers typically express discontent by simply not returning to the spa

Experiential Barriers to Evolution in the Spa World

- Spa-goers tend to languish at their given level of involvement for extended periods of time due to values preventing them from experimenting with new treatments. In particular, many goers feel blocked from evolving further into the Spa World due to concerns about nudity
- **Trend:** Massage will continue to grow and dominate spa experiences

Spa-Goer Perceptions of Spa Products

The Role of Product Sales at Spas

- Products are not top of mind for spa-goers, but services are
- Despite industry attempts to the contrary, consumers perceive spas as poor places for learning about skin care, but excellent resources for product purchases. The problem is in executing the knowledge transfer in a way that seems consumer-centric rather than sales-centric
- Traditional retail sales and marketing tactics threaten the sacred quality of the service environment expected at spas
- Spa-goers expect to find products in the lobby areas but do not want these retail spaces to be cluttered or extensive
- **Trend:** Drug stores are competition as spa-goers are finding high quality skin care products and consultations in convenient places
- **Trend:** Gender-specific products are in demand; especially men's skin care and traditional shaving products

Best Practices for Product Sales

- Spa products are best sold after treatments during transitional moments where conversation is feasible and appropriate between the spa-goer and therapist/technician. Along these lines, spa products are best sold through therapists/technicians spa-goers are interacting with during their visit.
- Spa products are best sold through consumer-led sales tactics drawing on the art of listening. Consumers are most open to product purchases when sales efforts are combined with empowering, individually tailored information from therapists
- Spa-goers crave customized skin care knowledge tied to concrete solutions

- **Trend:** Spa-goers are purchasing products through the Internet to capitalize on low prices. New product trial is difficult, however, as there is no sensory experience

Spa-Goer Perceptions of Merchandising at the Spa

- Sampling is key to driving product switching/experimentation in skin care, which is the category spas generally play in most logically in spa-goers' eyes
- Product categories that focus on the following tend not to be great for spa merchandising: everyday skin care for body regions (e.g., moisturizers, skin cleansers, exfoliants) generally covered by clothing, and hair care
- Strong product categories at spas include those that extend well done service experiences, re-create spa ambiance at home, and products with indigenous active ingredients
- Spa-goers perceive spas as excellent resources for facial care products, but not for education
- Spa-goers are in a perpetual state of openness to the "silver bullet" facial care product

The Non-Spa-Goer

Spa Drivers in the Lives of Non-Spa-Goers

- Non-spa-goers respond to the same drivers as spa-goers (e.g., Escape, Indulgence, and Work) but they typically fulfill these motives through experiences they can provide for themselves (e.g., at home facial)
- There is a hierarchy of drivers for non-spa-goers: 1) Work, 2) Escape, and 3) Indulgence

Work

- Work is everywhere in non-spa-goers' everyday life, and this necessitates Escape and Indulgence from time to time
- Receiving an authentic and trustworthy experience is key for non-spa-goers to have Work done in order to perform better in all areas of their lives

Escape

- Escape is equated with “me time,” seeking solace and solitude, and needing to Escape the pressures of home life
- Culturally, Escape is achieved through a sense of being “away”

Indulgence

- Indulgence is construed as a “guilty pleasure,” something to be managed and practice self-control, but can be engaged in with balance and moderation
- Acceptable pathways to Indulgence include: rewards, consolation, breaks, treats, special occasions

Barriers

- Barriers to spa-going include:
 - Negative impressions and stereotypes (e.g., spas are fluffy places for fluffy people)
 - Spa-going is indulgent
 - No social network driver (i.e., family, friends, etc.) to motivate participation
 - Gender role influences
- **Trend:** When considering the Spa World, non-goers express a need for a credible testimonial-based guide to spas (e.g., Zagat)
- **Trend:** Male spa-goers are increasing and they desire spa menus that are oriented to men. The metrosexual male spa-goer may even desire spas that are exclusively male

Introduction



Background and Objectives

As a follow up to the *ISPA 2004 Consumer Trends Report: Variations & Trends on the Consumer Experience*, the International SPA Association commissioned The Hartman Group to conduct quantitative and qualitative research to gain greater understanding of the spa-going consumer and the non-spa-going consumer in the US and Canada. With the exception of Chapter II, this report is based on the qualitative research conducted by The Hartman Group.

This chapter provides language and information on which the reader's understanding of the remaining chapters should be grounded. The World of Spas is a shorthand way of referring to all of the individuals and businesses that use, maintain, manage, support or otherwise deal with spas. A key feature of the Spa World is the extent to which consumers commit to spa activities as a lifestyle choice. At one extreme, we find consumers who spend more time and energy learning about and visiting spas than any other consumers. Their personal goals and interest in going to spas is fundamentally different from the average consumer who visits a spa. At the other extreme, we find consumers with only passing interest in spas. These consumers have little interest in becoming very knowledgeable about the various types of spa treatments and do not view their visits to spas as an integral part of their lives. Between these two extremes lie the

majority of consumers who go to spas. They may share some attitudes and interests with the more committed users, but have yet to make going to spas a major lifestyle choice.

These three categories of spa-goers (the two extremes of high and low involvement and the middle ground) constitute three distinct segments of the Spa World. We refer to these segments as **Core** (most involved), **Mid-level** (somewhat engaged) and **Periphery** (least involved) spa-goers.

The defining characteristics of each segment were first identified through in-depth ethnographic and qualitative research conducted for ISPA in 2004.² Central to these differences is the degree to which consumers approach their spa experiences as part of a holistic, long-term orientation to health and wellbeing (i.e., Work) rather than a form of Escape or Indulgence. Core spa-goers view their treatments and experiences at spas as part of a larger wellness lifestyle, and even though they are not above being pampered, their main perspective of spas is in relation to health and wellness (Work). By way of contrast, Periphery spa-goers see their time at spas as Indulgence (though perhaps necessary to balance an otherwise stressful life). For the most part, Periphery spa-goers have not made strong connections between their spa visits and their health and wellness. Mid-level spa-goers fall somewhere between these extremes, with some of their spa experiences purposely linked to wellness pursuits and others decidedly intended purely as an Escape or Indulgence.

Quantitative Research

Quantitative research was employed to determine the size the World of Spas, to examine the use of spas according to varying levels of consumer involvement in the World, and to identify attitudes and behaviors that differentiate Core, Mid-level, and Periphery consumers in the Spa World. The World of Spas is a shorthand way of referring to all of the individuals and businesses that use, maintain, manage, support or otherwise deal with spas. The notion comes from a generalized model of consumer behavior designed to understand the attitudes and behaviors of consumers engaged in a given set of activities. In this case, the set of activities are those normally associated with spas. (See Appendix I for an explanation of the World Model and its relationship to the Spa World.)

The empirical basis of Chapter II. is two different quantitative survey methodologies. Omnibus telephone surveys to measure prevalence of spa use were conducted in September of 2005. A total of 4064 U.S. and Canadian consumers participated in this survey research. Shortly after the telephone surveys (December of 2005), a separate online survey of active spa-goers—i.e.,

² ISPA 2004 Consumer Trends Report: Variations & Trends on the Consumer Spa Experience is available at www.experienceispa.com

spa-goers who have received spa services while visiting at least one spa within the past 12 months—was fielded to gauge attitudes toward spas and use of spa products and services. A total of 3616 U.S. and Canadian spa-goers participated in this online survey research. The combination of these two methodologies, telephone interviewing and online surveying provides a robust picture of spa use among Canadian and U.S. consumers. Overall, 7680 American and Canadian consumers participated in the quantitative research.

Qualitative Research

The focus of the qualitative research, and hence of the majority of this report, was on gaining an understanding of consumer perceptions and expectations of spas across four types: day spa, destination spa, resort/hotel spa, and medical spa. In order to understand product consumption as well as services, particular attention was given to understanding consumer perceptions of spa products in the spa environment. Given that spa-going is not a mainstream feature of North American life, we explored non-spa-going consumer lifestyles to understand the underlying barriers to spa involvement.

During the months of January through April 2006, we conducted field research with consumers in Toronto, Vancouver, Atlanta and Seattle in order to understand:

Spa-Goers:

- Perceptions and expectations of a spa, treatments, and their visits
- How spa-goers measure and perceive value of the most used treatments
- What untried activities and treatments interest consumers, and what is keeping them from trying those treatments
- How consumers validate their spa choice
- How spas and spas staff speak the language of the consumer, and not the language of spa
- How spas address quality, in the eyes of the consumer
- How spas manage consumer's onsite comfort expectations, and at what point consumers get comfortable
- When consumers start planning for a spa experience
- What consumers immediately identify with the spa experience and what the word "spa" means to them
- Which unusual treatments are catching on and which ones are routinely passed over and why
- When during the spa experience spa-goers want to hear about products

- How products should be introduced
- What kind of products, especially skin care products, should spas be selling to spa-goers

Non-Spa Goers:

- Who is the non-spa-goer, and why they have not been to a spa
- Why non-spa-goers choose services other than those at spas to fulfill similar broad drivers linked to spa-going (e.g., Escape, Indulgence, and Work)
- What alternatives non-spa-goers choose and whether they differ from the alternatives that spa-goers choose
- How non-spa-goers manage their wellness
- What the barriers are to spa-going among the non-spa-goers
- Whether non-spa-goers select spa experiences outside of spas and why
- What information sources non-spa-goers rely on as credible
- What the non-spa-goer perception is of a spa and the spa experience
- Non-spa-goer's typical knowledge of spas and the spa experience

Toronto, Vancouver, Atlanta and Seattle were selected because our previous research has identified them as cities with trend-setting consumers in the areas of health, wellness, and self-care. On a more pragmatic level, these cities were also selected because they have large populations of spa-goers and non-spa-goers, and a variety of spa types.

Qualitative Methodology³

Based on the study objectives, we utilized a combination of qualitative methods rooted in ethnography to gain an in-depth understanding of what spa-going and different spa types look like through consumers' eyes. Ethnography allows us to enter into firsthand interaction with people in their everyday lives so that we can reach a better understanding of their beliefs, motivations, values, and behaviors. Unlike traditional focus groups, where participants are typically unfamiliar with the setting and co-participants, our approach puts consumers in their natural environment (e.g., their homes, at spas), allowing them to behave more like they would in the course of their everyday activities and patterns.

To ensure ideal respondent profiles of both spa-goers and non-spa-goers, respondents were selected with an in-depth qualitative and articulation screener. Approximately 75 individuals

³ A description of the Quantitative Methodology on which Chapter II is based is available in Appendix II of this report.

were screened to result in the final sample of 36 individuals (25 spa-goers – 15 in Canada, 10 in the US; 11 non-spa-goers – 6 in Canada, 5 in the US). For qualitative and ethnographic fieldwork, we intentionally draw a sample that builds in variety and opportunities for intensive study. Our intellectual capital and past experience in this field allows us to recognize and incorporate a large population of cases, but for each study, we recruit a small subpopulation that allows us to spend more in depth time with fewer numbers. We spend a minimum of two hours with each respondent and incorporate a host of complementary methods to ensure rich attitudinal and behavioral insights. Finally, we continue fielding until we have hit a point of saturation in the sample, which is evidenced by the emergence of predominant themes and patterns derived from the total sample. These techniques have proven effective not only in developing a robust analysis but in identifying fresh perspectives and insights.

The minimum general qualifications for participation in this study were:

Spa-Goers:

- Had visited a spa (e.g., medical spa, destination spa, resort/hotel spa, or day spa) within the past 12 months

Non-Spa-Goers:

- Had not been to a spa within the past 12 months with no, or very limited, previous experience at spas
- No intention of visiting a spa
- Reason for not returning, or not having been, to a spa was not solely financial

This research used a combination of the following methodologies:

- Spa Experience Audits (25 spa-goers)
- In-home Interviews (11 non-spa-goers)
- Retail Observation
- Language Analysis

Spa Experience Audits

The Experience Audit is a proprietary analytical approach developed by The Hartman Group. It is a process by which the spa experience is evaluated from the consumer's perspective. We recruited consumers, in advance, to visit a spa and then be interviewed by The Hartman Group researchers immediately following the spa visit. Respondents were met at the spa and engaged in a brief in-spa interview to discuss spa products, product layout, and spa design. We then followed respondents to their homes for an in-depth 2-hour interview in which the consumer debriefed us on how their visit proceeded from entrance to exit.

In-Home Interviews

In-depth in-home interviews were conducted with non-spa-going consumers, and each interview lasted approximately 2 hours. The interviews were semi-structured discussions of participants' orientation to wellness behaviors and body care. Participants were also encouraged to comment on their perceptions of spas and the spa experience. Awareness of spas, latent interest in spas, and barriers to spa-going were explored.

Retail Observation and Photo-documentation

Our team engaged in naturalistic observation of spa environments, behavioral patterns of spa-goers, and the effect of contextual factors in a variety of spas in both Canada and the US. These spa observations also considered issues of design and ambiance in order to assist the analysis of spa-goer narratives.

Language Analysis

Language analysis uses words as data. Our team listened to consumers' speech to identify language that consumers use and understand as it pertains to the Spa World. Words and phrases that resonate with consumers are highlighted with language maps in the report.

Report Outline

This report is structured to provide a comprehensive understanding of the spa-going and non-spa-going consumer. Analytically, there were no notable differences between respondents from the US and Canada, consequently the findings presented are based on both samples. This report will describe distinctions among four spa types (e.g., day spa, destination spa, resort/hotel spa, and medical spa), explain nuances of the spa experience from the consumer's perspective, and provide an understanding of spa products. The report also provides recommendations for deepening consumers' involvement in the Spa World, improving product sales and merchandizing, and converting the non-spa-goer.

More specifically, *Chapter II. Consumer Segmentation and the World of Spas*, examines the size of the World of Spas, and identifies attitudes and behaviors that differentiate Core, Mid-level, and Periphery consumers in the Spa World.

Chapter III. Distinctions Between Spa Types, describes spa-goer images and associations with the word "spa." Distinctions among four major spa types (e.g., day, destination, resort, and medical) are highlighted through an explanation of spa-goers' varying drivers, expectations, images, and associations for each spa type.

Chapter IV. A Deeper Look at Nuances of the Spa Experience, describes the essential aspect of spa-going as a thoroughly guided experience from pre-visit considerations through post-visit follow-up. Understanding the nuances of the spa experience is furthered through a discussion of the influences of key components of spa ambiance. This chapter also explains barriers preventing Periphery and Mid-level spa-goers from deeper evolution into the Spa World and provides recommendations to overcome these obstacles.

Chapter V. Spa Products, explains spa-goer preferences for spa product sales such as when, where, by whom, and how product sales should occur. This chapter also identifies strong and weak areas for spa product merchandizing, and makes general merchandizing recommendations.

Chapter VI. Merchandising at the Spa: What Spa-Goers Want to Buy at Spas and How, describes the general principles behind skin care purchasing. The chapter also identifies how to merchandise spa products by spa type.

In conclusion, *Chapter VII. Non-Spa-Goers*, describes how the dominant spa-going drivers (e.g., Escape, Indulgence, and Work) pertain to the non-spa-goer. This chapter also outlines the non-spa-goer's general impressions of the spa experience and identifies the barriers to spa use (e.g., negative stereotypes, resistance to self-indulgence, lacking social network drivers, gender identity issues, and concerns about nudity). Recommendations for converting the non-spa-goer to a spa-goer conclude the chapter.

Important Terminology

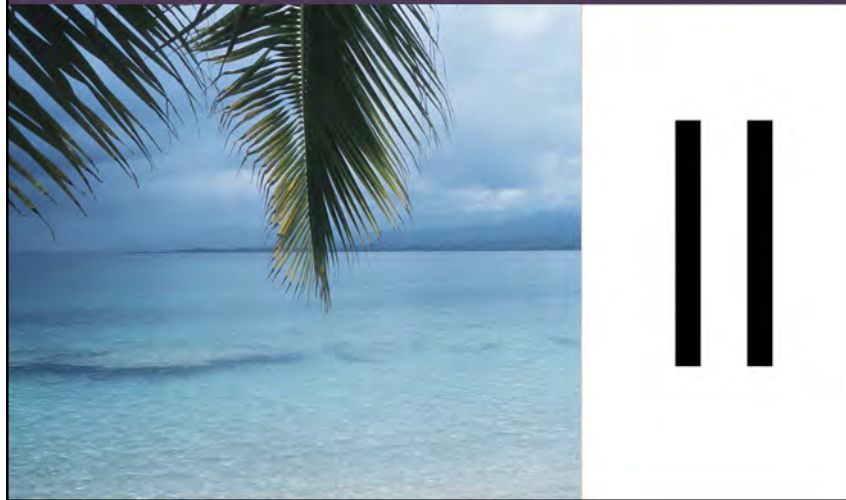
The following chart defines terms that are frequently used throughout the report. The basic distinction between spa-goer and non-Spa-goer is presented. The motivations, or drivers, that lead spa-goers to the Spa World are contrasted with definitions of the same drivers, but from the non-spa-goer's perspective. Finally, levels of involvement (e.g., Periphery, Mid-level, and Core) in the Spa World are delineated.

REPORT TERMINOLOGY	
Spa-Going Status	
Spa-Goer - A person who has visited a spa (e.g., medical spa, destination spa, resort/hotel spa, or day spa) within the past 12 months	Non-Spa-Goer – A person who has not been to a spa within the past 12 months with no, or very limited, previous experience at spas. They also have no intention of visiting a spa, or their reason for not returning/ not having been to a spa was not solely financial

REPORT TERMINOLOGY			
Drivers			
Spa-Goer		Non-Spa-Goer	
Escape – Seeking a spa experience as a means of getting away from, or avoiding, aspects of one’s everyday life (i.e., stressors)		Escape – Seeking “time out” or “time away” from the harried pace and general duties, obligations, and pressures of life.	
Indulgence – Seeking a spa experience that adds to pleasure or comfort but is not absolutely necessary		Indulgence – Seeking pleasurable experiences that do not generate uncomfortable levels of guilt, often in the form of rewards, comforts, breaks and special occasions.	
Work – Seeking spa experiences as part of a holistic, long-term orientation to health and wellbeing (i.e., therapeutic goals)		Work – Seeking to achieve or accomplish areas of life that can no longer be taken for granted in North America (e.g., mental health, durable relations, career success).	
Level of Involvement in the Spa World			
Periphery	Mid-level	Core	Have yet to enter the Spa World
Periphery spa consumers see their time at spas as largely indulgent (though perhaps necessary to balance an otherwise stressful life). For the most part, Periphery spa consumers have not made strong connections between their spa visits and their health and wellness.	Mid-level spa consumers fall somewhere between the extremes of Periphery and Core, with some of their spa experiences linked to wellness pursuits and others decidedly intended as an Escape or Indulgence.	Core spa consumers view their treatments and experiences at spas as part of a larger wellness lifestyle, and even though they are not above being pampered, their main perspective of spas is in relation to health and wellness.	

REPORT TERMINOLOGY			
Definitions of Spa Types			
Day	Resort/Hotel	Destination	Medical
A spa offering a variety of professionally administered spa services to clients on a day-use basis.	A spa owned by and located within a resort or hotel providing professionally administered spa services, fitness and wellness components and spa cuisine menu choices. In addition to the leisure guest, this is a great place for business travelers who wish to take advantage of the spa experience while away from home.	A destination spa is a facility with the primary purpose of guiding individual spa-goers to develop healthy habits. Historically a seven-day stay, this lifestyle transformation can be accomplished by providing a comprehensive program that includes spa services, physical fitness activities, wellness education, healthful cuisine and special interest programming.	A facility that operates under the full-time, on-site supervision of a licensed health care professional whose primary purpose is to provide comprehensive medical and wellness care in an environment that integrates spa services, as well as traditional, complimentary and/or alternative therapies and treatments. The facility operates within the scope of practice of its staff, which can include both Aesthetic/Cosmetic and Prevention/Wellness procedures and services.

Consumer Segmentation and the World of Spas



On a general level, this chapter has a twofold objective. First, the chapter provides a statistical portrait of the size of the World of Spas. Second, the chapter provides a window to the behaviors and attitudes that differentiate the use of spas according to varying levels of consumer involvement in the World of Spas.

Sizing the Spa World

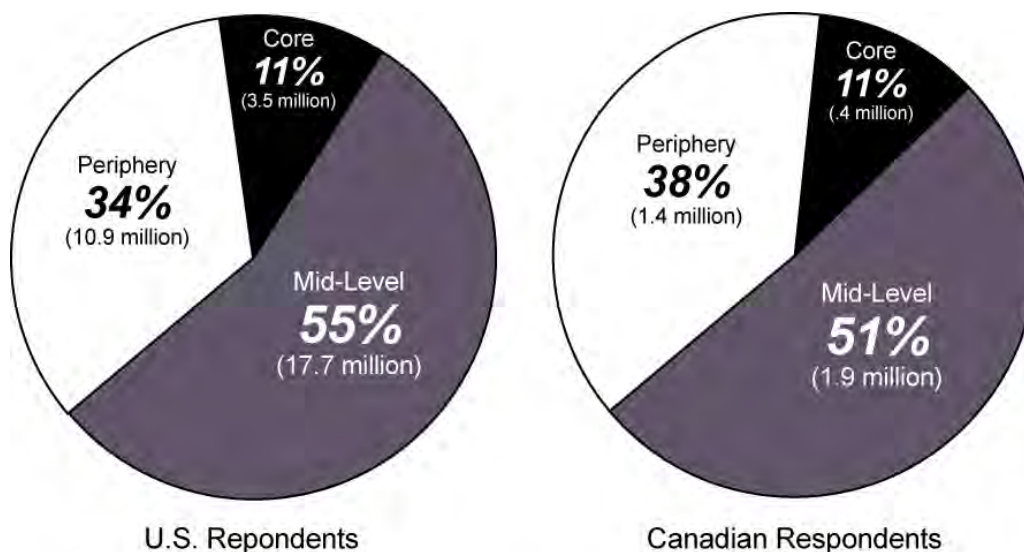
Overall, about fifteen percent of the adult consumer population in Canada (14%) and the U.S. (15%) actively participates in the World of Spas (i.e., has been to at least one spa in the past 12 months). Among these spa-goers, however, participation varies in intensity from Core to Periphery of the World of Spas. The most intensely involved consumers form the hardcore center of the Spa World and help to define the direction that cutting edge products and services will take. At the same time, these consumers constitute only a small part of the total market (see Appendix I), albeit one that tends to be the most vocal and the most willing to pay premium prices for their spa experiences.

In view of the results shown for the two countries elsewhere it is perhaps not surprising that the distribution of spa-goers across the segments should be remarkably similar for both the U.S. and Canada. One in ten spa-goers (11%) will treat their spa experiences as an integral part of a

larger health and wellness regimen rather than a purely indulgent exercise. In contrast, the majority of spa-goers will plan their visits to spas with more short-term goals in mind. For the roughly one third (34% in the U.S., 38% in Canada) of spa-goers making up the Periphery, escape and pampering are the order of the day. The remainder (i.e., the Mid-level segment) represents a mix of interests that run the gamut from indulgence to healing work.

What these results show is that the vast majority of spa-goers do not yet look to spas to meet fundamental wellness needs. Instead, the primary goals of most spa-goers (because they occupy Mid-level to Periphery positions in the Spa World) would revolve around notions of escape, rejuvenation or tranquility and, in many cases, would be measured by visible signs of stress relief, a “healthy glow,” a more youthful appearance or other outward indications of transformation. Indeed, an interesting feature of Periphery to Mid-level appreciation of the spa experience is that it represents something special, whereas for many Core spa-goers the expected rituals and trappings assume a nearly routine character. And even though the Core spa-goer is more attuned to (and correspondingly sensitive to departures from) “proper” spa etiquette and protocol than Periphery and Mid-level spa-goers are, they do not have heightened expectations for the spa experience itself. In contrast, Mid-level and, perhaps especially, Periphery spa-goers desire their spa experiences to transcend the ordinary precisely because they reserve these experiences for special occasions.

Figure 1
Size of Spa-Goer Segments



Note: Estimated number of active spa-goers shown in parentheses.

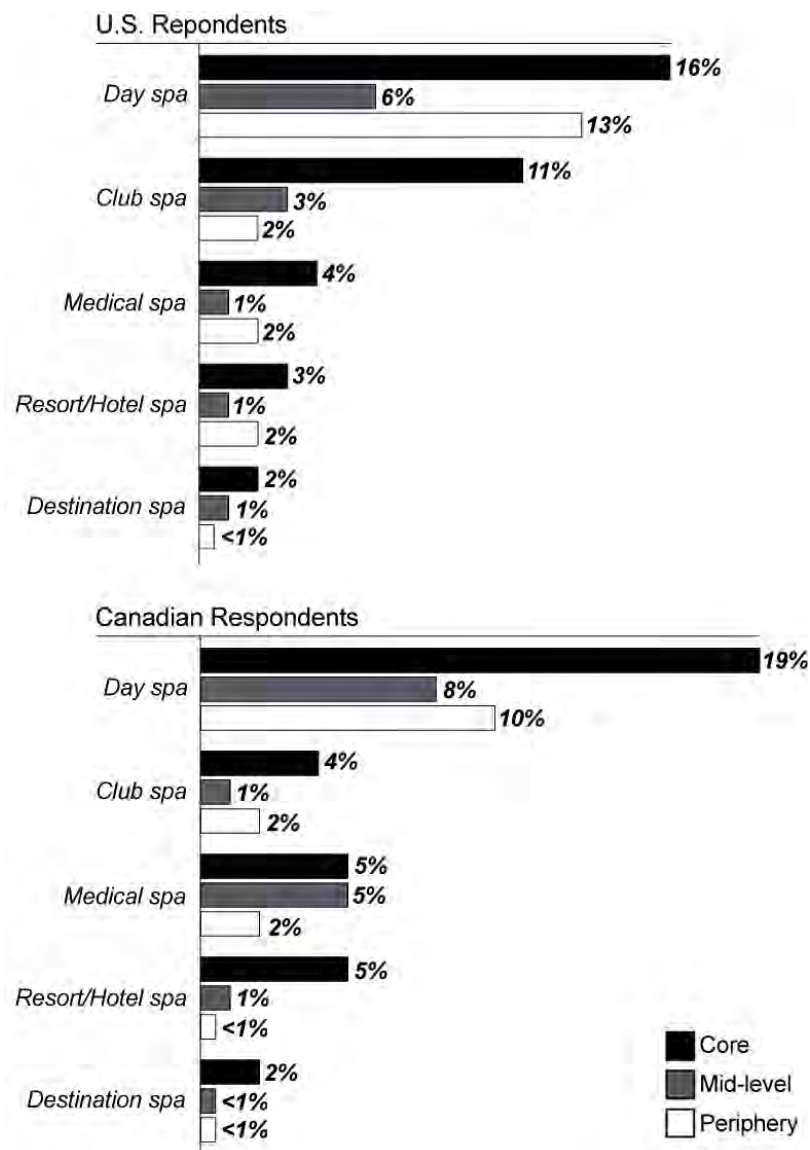
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

One indication that trips to a spa are more routine for Core spa-goers than for the other two segments is a greater frequency of visits by Core spa-goers, which suggests spa visits are a much more regular part of these consumers' lives.

Frequency of Visits

In Figure 2 we see that Core spa-goers are much more likely to make at least seven visits to every kind of spa than either Mid-level or Periphery spa-goers.

Figure 2
Frequent Spa-goers – 7+ Trips per Year (By Segment)



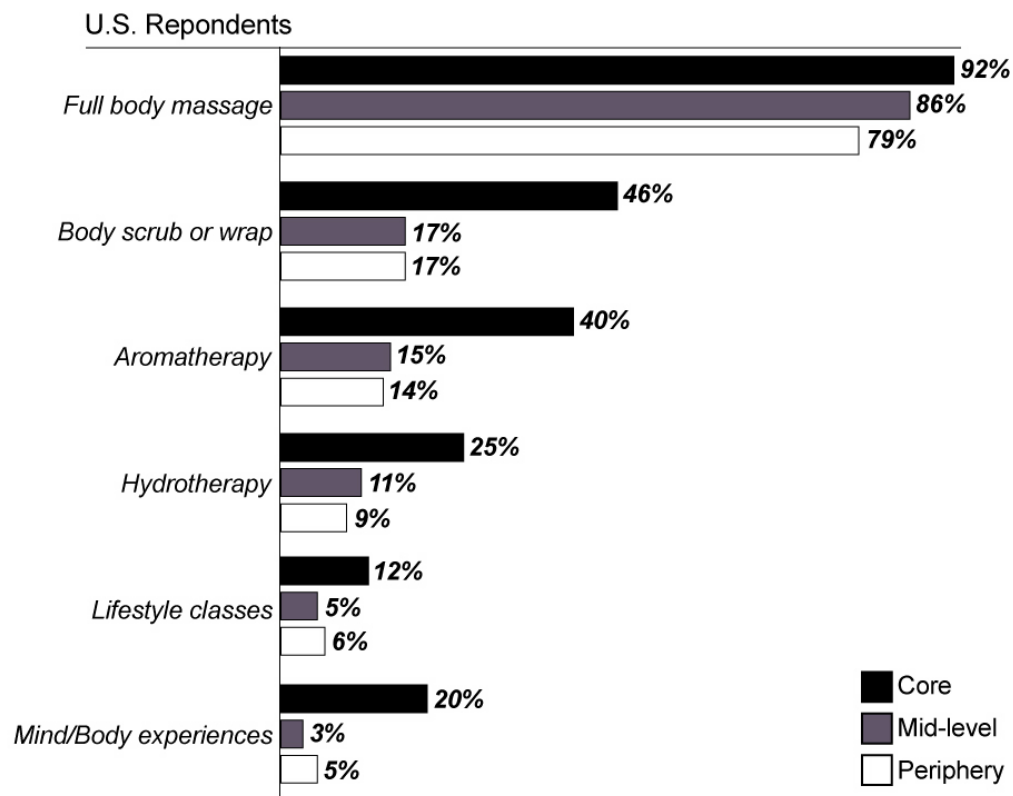
Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Compared to Core spa-goers, in fact, Mid-level and Periphery consumers exhibit quite similar patterns in their frequency of visits. The lone exception is the large percentage of Periphery U.S. consumers who frequent day spas. In this particular instance, Periphery spa-goers resemble Core spa-goers more than Mid-level consumers.

Use of Spa Services

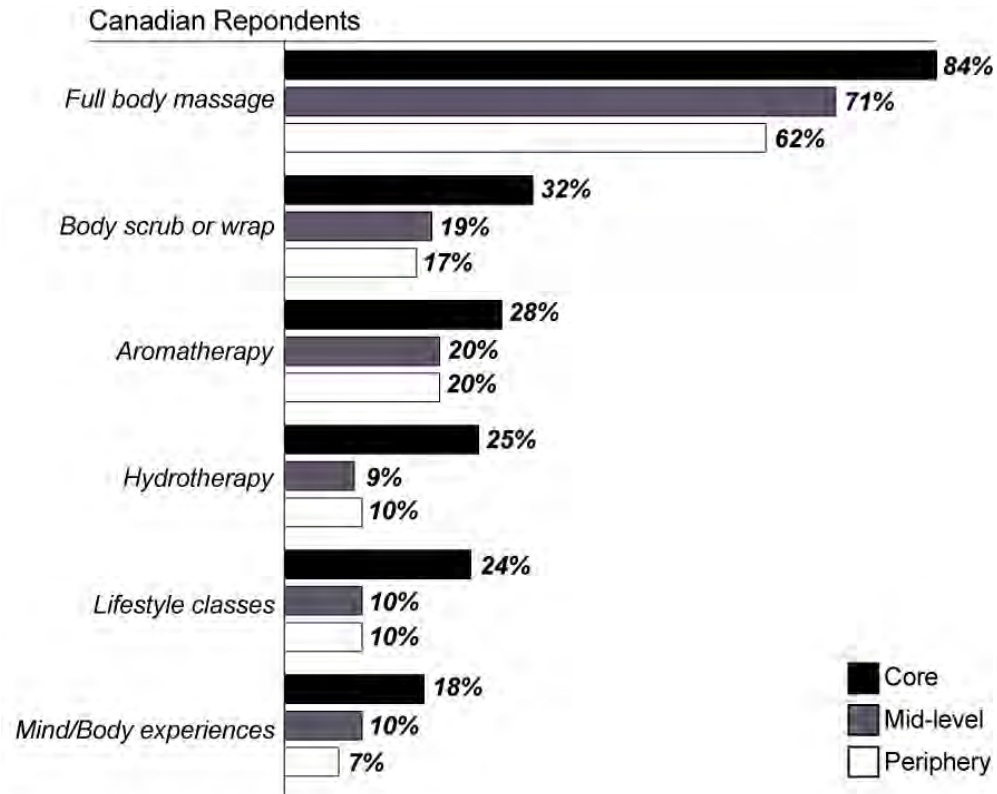
While Core spa-goers are on the whole more involved and committed to spa use, they also happen to be more likely to experience particular types of spa treatments than other spa-goers (Figure 3). In both countries, Core spa-goers are significantly more likely than other spa-goers to experience a body scrub/wrap or hydrotherapy. In the U.S., Core spa-goers are significantly more likely than other spa-goers to experience aromatherapy and to participate in a mind/body class.

Figure 3
Which Services Have You Experienced in the Past Year? (By Segment)
Categories Showing Significant Differences across Segment in One or Both Countries



Sources: U.S. results based on 1707 respondents.

Figure 3 (continued)
Which Services Have You Experienced in the Past Year? (By Segment)
Categories Showing Significant Differences across Segment in One or Both Countries



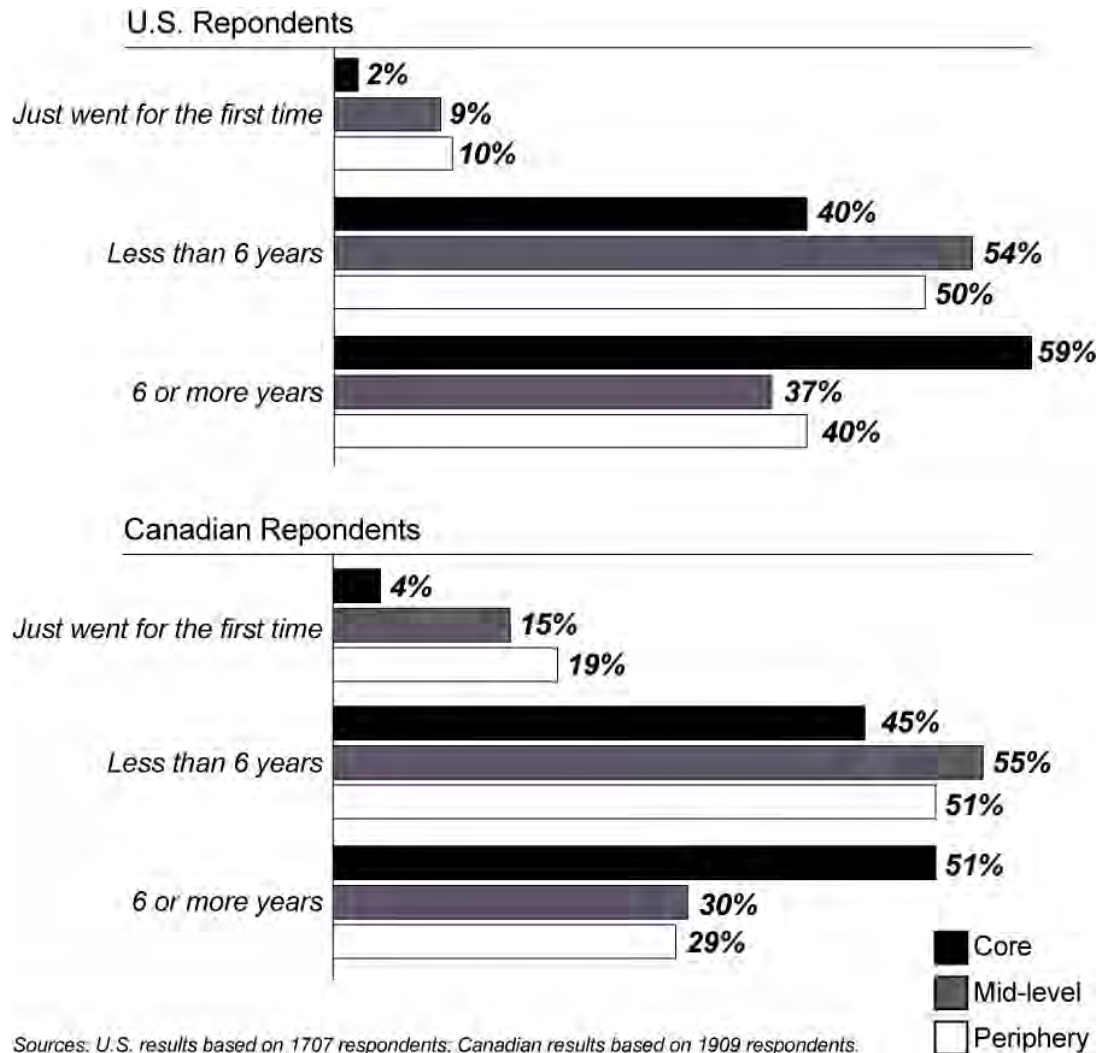
Sources: Canadian results based on 1909 respondents.

In Canada, Core spa-goers are significantly more likely than other spa-goers to experience a full body massage and to take a lifestyle class.

Years of Experience with Spas

The number of years that a person has been going to spas is a measure of their commitment to spas as a lifestyle choice. The next figure shows that Core spa-goers are much more likely to have started visiting spas six or more years ago.

Figure 4
How Long Have You Been Visiting Spas? (By Segment)



The chart reveals two interesting features of the Spa World as it currently operates. First, consumers rarely enter the Spa World at the Core. This is understandable given the amount of information gathering, experimentation, evaluation and lifestyle *negotiation* that adopting a Core orientation entails. Becoming passionate about and committing to a set of activities (at the exclusion of others) is something few consumers can easily manage. At best, such a process is evolutionary. Thus, we find very few Core spa-goers are first-timers. On the other hand, Mid-level and Periphery spa-goers are equally likely to have just started going to spas. Impediments to entry into the Spa World do not appear any greater for Mid-level spa-goers than they do for Periphery spa-goers. Put differently, consumers do not all start on the Periphery and work their way to Mid-level and beyond.

The second main feature of the Spa World revealed by this chart is how long it takes consumers to migrate towards the Core of the World. The process of evolving toward Core participation appears to take several years to achieve. We can see this by comparing the relative size of Core, Mid-level and Periphery segments over time. Whereas, virtually none of the first-timers is a Core spa-goer, by the time we reach six or more years, the percentage of Core consumers has risen to 50% or more. Before that point, the likelihood of finding a Core spa-goer is still less than that for the other two segments. Thus, the process of converting a newcomer to the ways of a Core spa-goer can take several years.

Knowledge of Spas and the Spa Experience

A common attribute of Core consumers in any world is their thirst for knowledge. They cannot learn enough about the products and services that fuel their passions. One by-product of knowledge acquisition in the Spa World is developing a sense of how to behave properly. By adopting the language and perceptions of experienced therapists, spa-goers achieve a level of comfort with the various rituals and codes of behavior that separate the seasoned spa-goer from the rank beginner.

Spa-goers from Core to Periphery feel equally uncomfortable with various aspects of the spa experience as shown in Figure 5. Chief among these are being shown spa products for purchase, waiting for a treatment and expressing concerns regarding a visit. Fewer than 10% of U.S. or Canadian spa-goers indicate being extremely comfortable with these areas. Interestingly, these three represent very different situations. Being shown products for purchase makes spa-goers uncomfortable because it injects a commercial transaction into an altogether different kind of experience. For many spa-goers, the cold, rational calculus of barter and exchange is completely at odds with the indulgent, escapist or transformative experience sought from a spa visit.

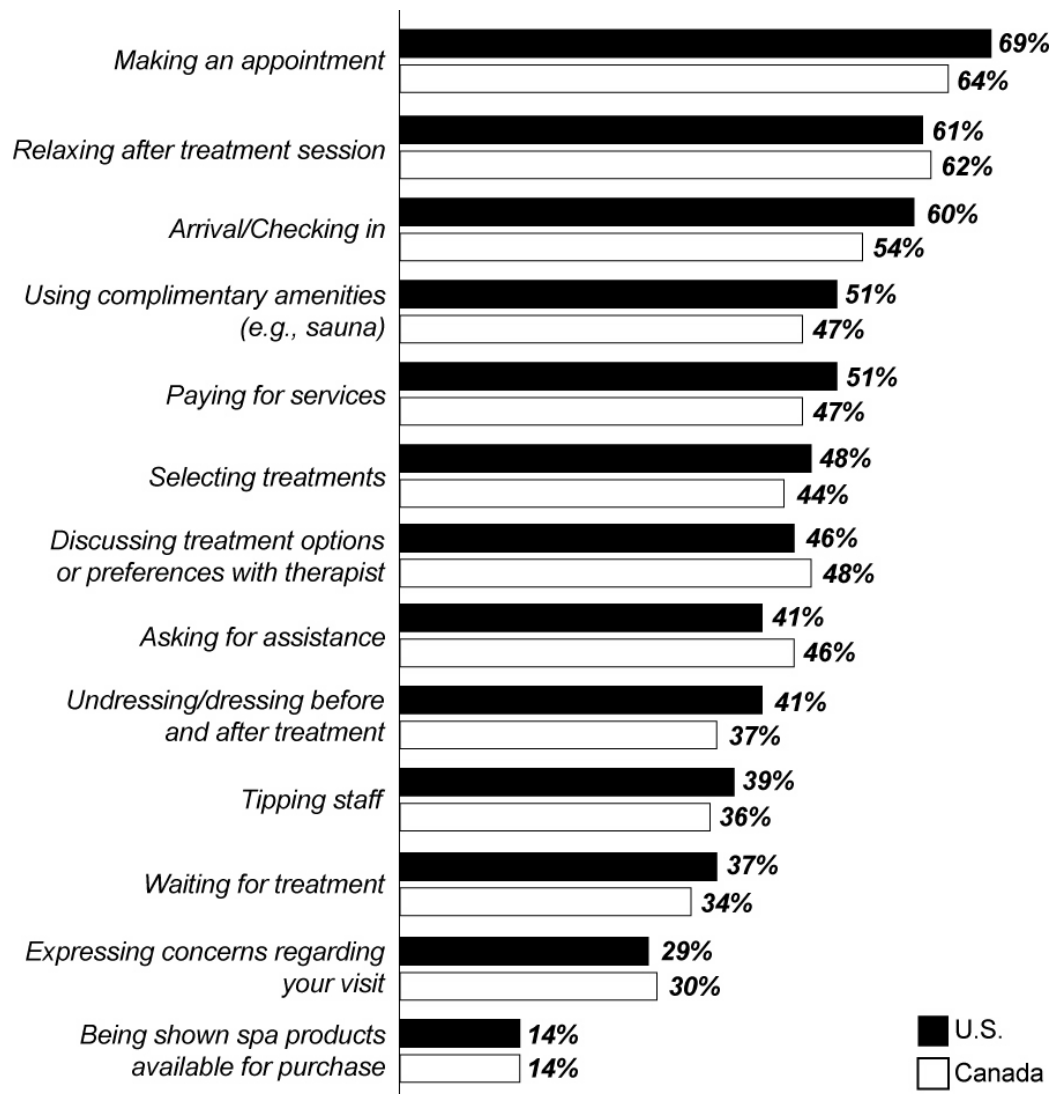
Waiting for a treatment poses a somewhat different dilemma; namely, what to do and for how long. For those who have not become familiar with the transition between arrival and treatment, waiting becomes a big unknown. For the most inexperienced spa-goers, waiting for a treatment is akin to waiting



for any other appointment, whether it is at a doctor's office, a hair salon or a bank. Rather than use this stage of the spa experience to prepare for the treatment emotionally and spiritually (i.e., to transition from the day-to-day), these spa-goers find themselves just "killing time."

Finally, the need or desire to express one's concerns about a spa visit is yet another uncomfortable situation for most spa-goers. Rather than voice such concerns, most spa-goers make assumptions about what is and is not proper behavior at the spa, and suffer in silence. Consumers generally have trained themselves to get through situations that are awkward or uncomfortable and, rather than raise concerns, determine never to return. In this instance, it may mean never returning to a particular spa or, if the concern is general, never returning to any spa. That most consumers are well trained to disguise dissatisfaction or discomfort in unfamiliar social situations makes it all the more difficult for staff to recognize anything is amiss. Consequently, creating a structured way to allay concerns early in the spa experience could be very valuable.

Figure 5
Being Extremely/Very Comfortable with Aspects of the Spa Experience



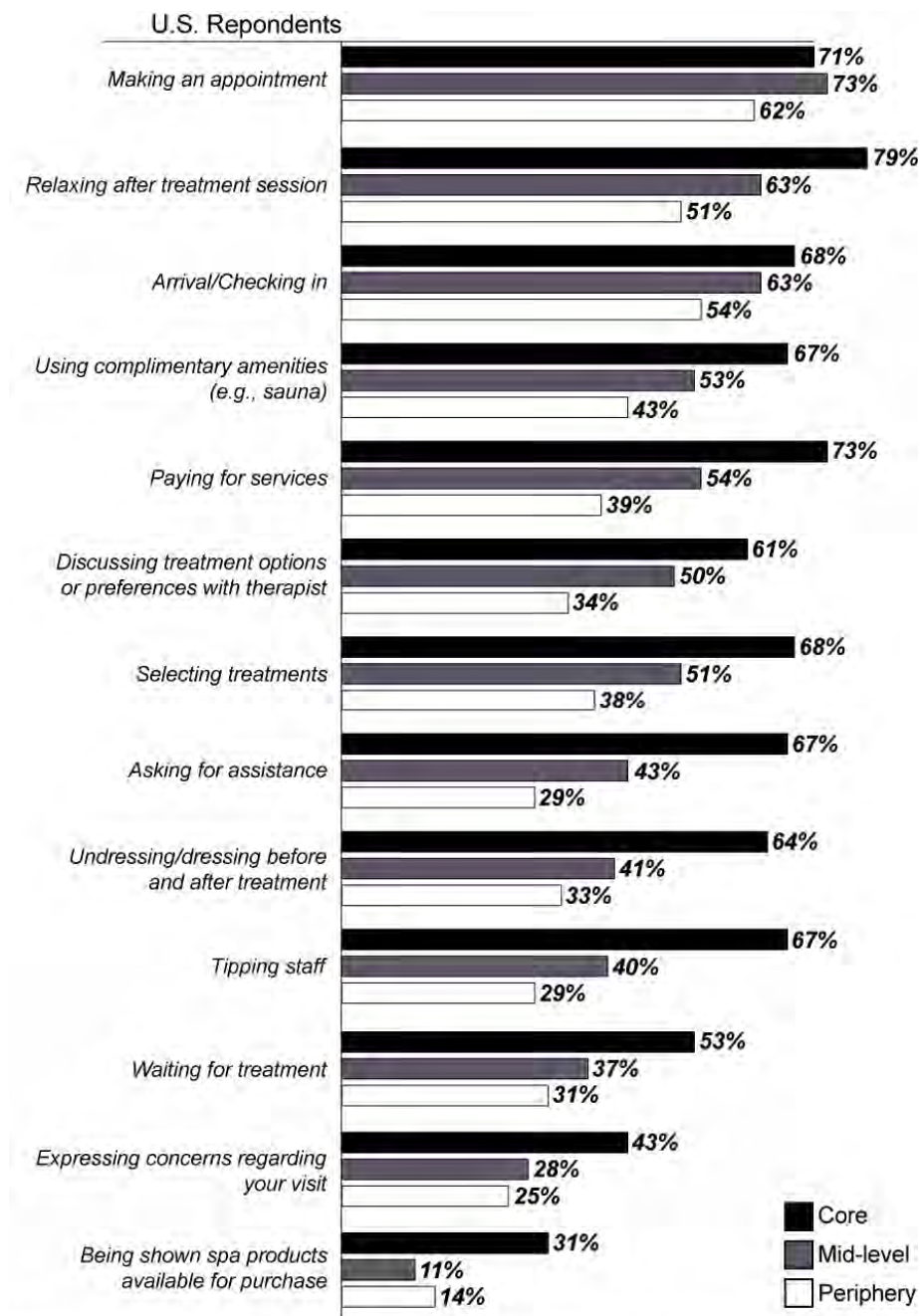
Percentages of respondents who feel "Extremely comfortable" or "Very comfortable" (results based on answers on a 5-point scale ranging from "Extremely comfortable" to "Not at all comfortable.")

Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Figure 6 lists various aspects of the spa experience and indicates the percentage of consumers in each spa segment that feels very (or extremely) comfortable with them. Each of the elements shown in the chart demonstrates how the segments differ from one another. In general, areas that would be most unfamiliar to spa-goers with little actual spa experience (i.e., Periphery and some Mid-level spa-goers) are areas that they express the least comfort negotiating. Secondly, situations in which an ambiguous social component is present do not inspire a

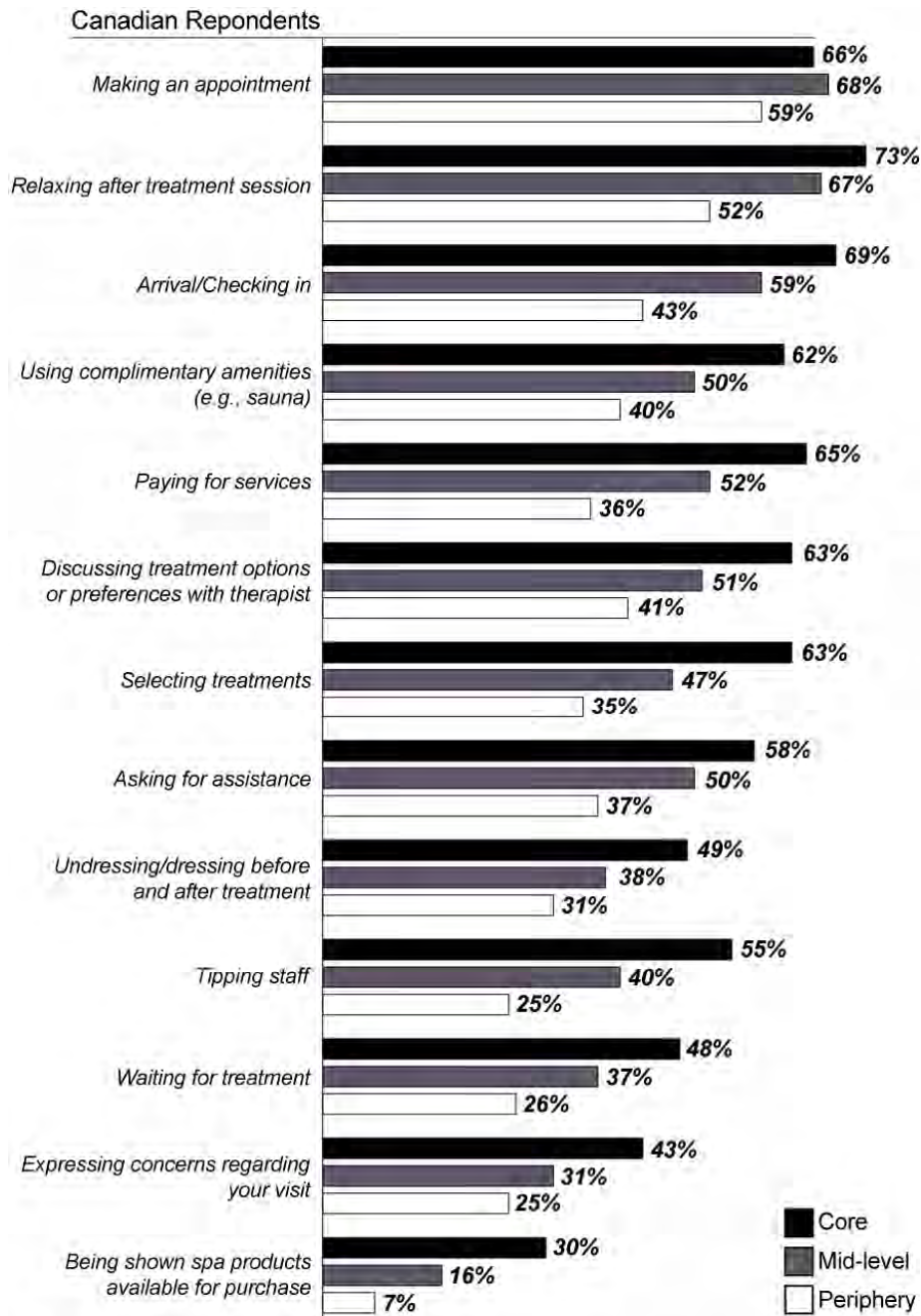
great deal of confidence either. In part, this reflects the discomfort individuals normally feel when interacting in unfamiliar social situations. Putting spa-goers at ease under these circumstances should be a high priority of spas that wish to increase the use of spas by Periphery and Mid-level spa-goers.

Figure 6
Being Extremely/Very Comfortable with Aspects of the Spa Experience (By Segment)



Percentages of respondents who feel "Extremely comfortable" or "Very comfortable" (results based on answers on a 5-point scale ranging from "Extremely comfortable" to "Not at all comfortable.")
Sources: U.S. results based on 1707 respondents.

Figure 6 (continued)
Being Extremely/Very Comfortable with Aspects of the Spa Experience (By Segment)



Percentages of respondents who feel "Extremely comfortable" or "Very comfortable"
 (Results based on answers on a 5-point scale ranging from "Extremely comfortable" to "Not at all comfortable.")
 Sources: Canadian results based on 1909 respondents.

The more treatments spa-goers know enough about to know what to expect from them, the more comfortable they feel about selecting treatments in general and discussing them with their therapist. In Table 1, for example, we find that the number of treatments about which spa-goers

are knowledgeable is strongly correlated with their level of comfort selecting treatments and discussing treatment options or making preferences known to therapists. Those who are not at all comfortable with either selecting treatments or discussing them with their therapist are only knowledgeable about three to four treatments, while those who feel extremely comfortable know their way around eight or more treatments.

Table 1
Average Number of Treatments Consumer is Knowledgeable About
(By Level of Comfort)

		How Comfortable				
		Not at all	Somewhat	Fairly	Very	Extremely
U.S. Residents	Comfortable selecting treatments?	3.1	5.5	5.9	8.1	8.5
	Comfortable discussing treatment options/ preferences with therapist?	3.2	5.4	6.4	7.7	9.5
Canadian Residents	Comfortable selecting treatments?	3.8	5.3	6.0	7.2	7.9
	Comfortable discussing treatment options/ preferences with therapist?	4.3	4.9	6.1	7.0	8.0

Note: Each cell shows the average number of treatments the spa-goer knows about at increasing levels of comfort with selecting treatments and discussing treatment options.

Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

In addition to gaining self-confidence from increased knowledge, there are other ways to ease the anxiety associated with the spa experience. In particular, spas can help by volunteering explanations of treatments or treatment options using language familiar to consumers. Rather than merely making the information available via brochures and other passive devices, taking a proactive approach to setting consumers at ease could create a point of differentiation with competitors who place the burden on the consumer.⁴

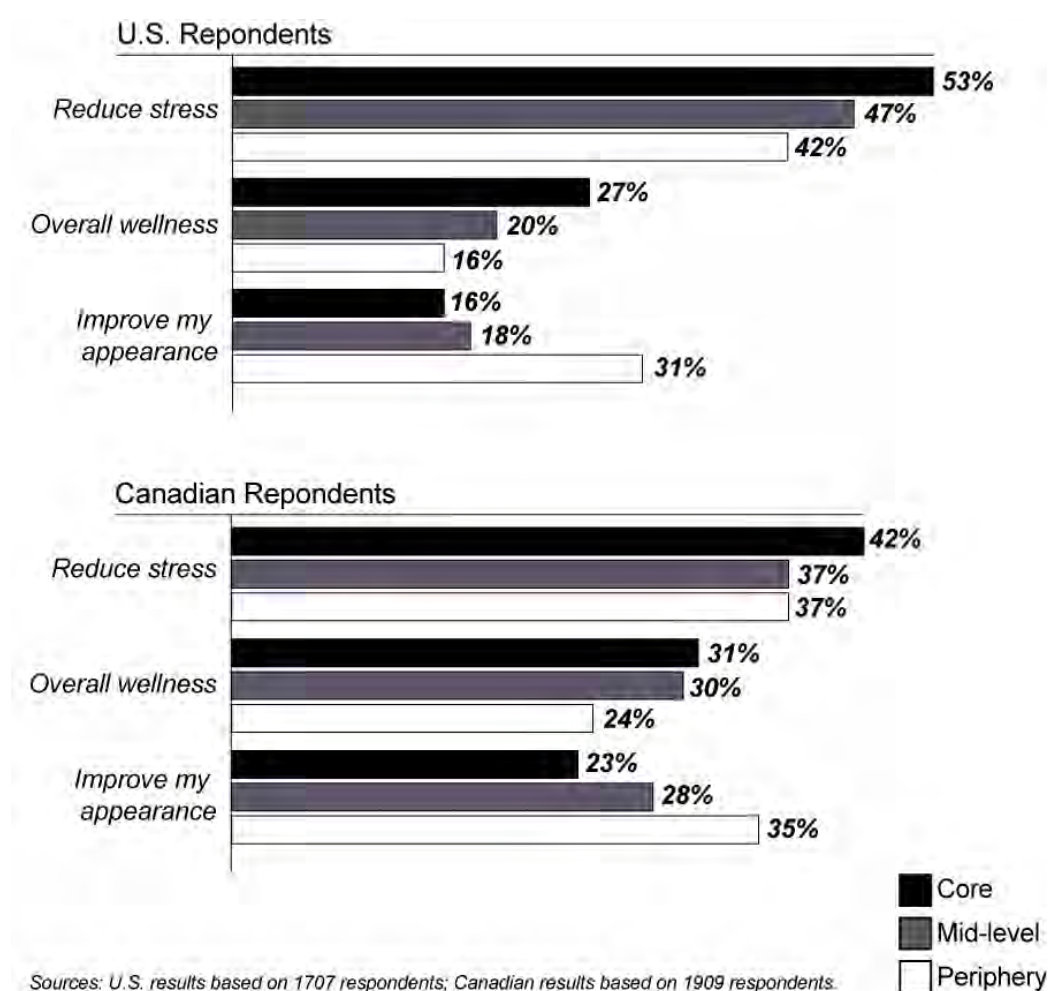
Consumer Participation in the Spa World

To gain a better understanding of what the spa experience means to consumers at different levels of involvement, we can examine their motives for going to spas and the reasons they cite for not going to spas. Figure 7 shows reasons spa-goers give for going to spas. These reasons

⁴ Note that experienced Core spa-goers do not appreciate being treated as naïve beginners. Discerning the difference between a relative newcomer and a serious Core spa-goer is crucial to managing the spa experience properly from the business side.

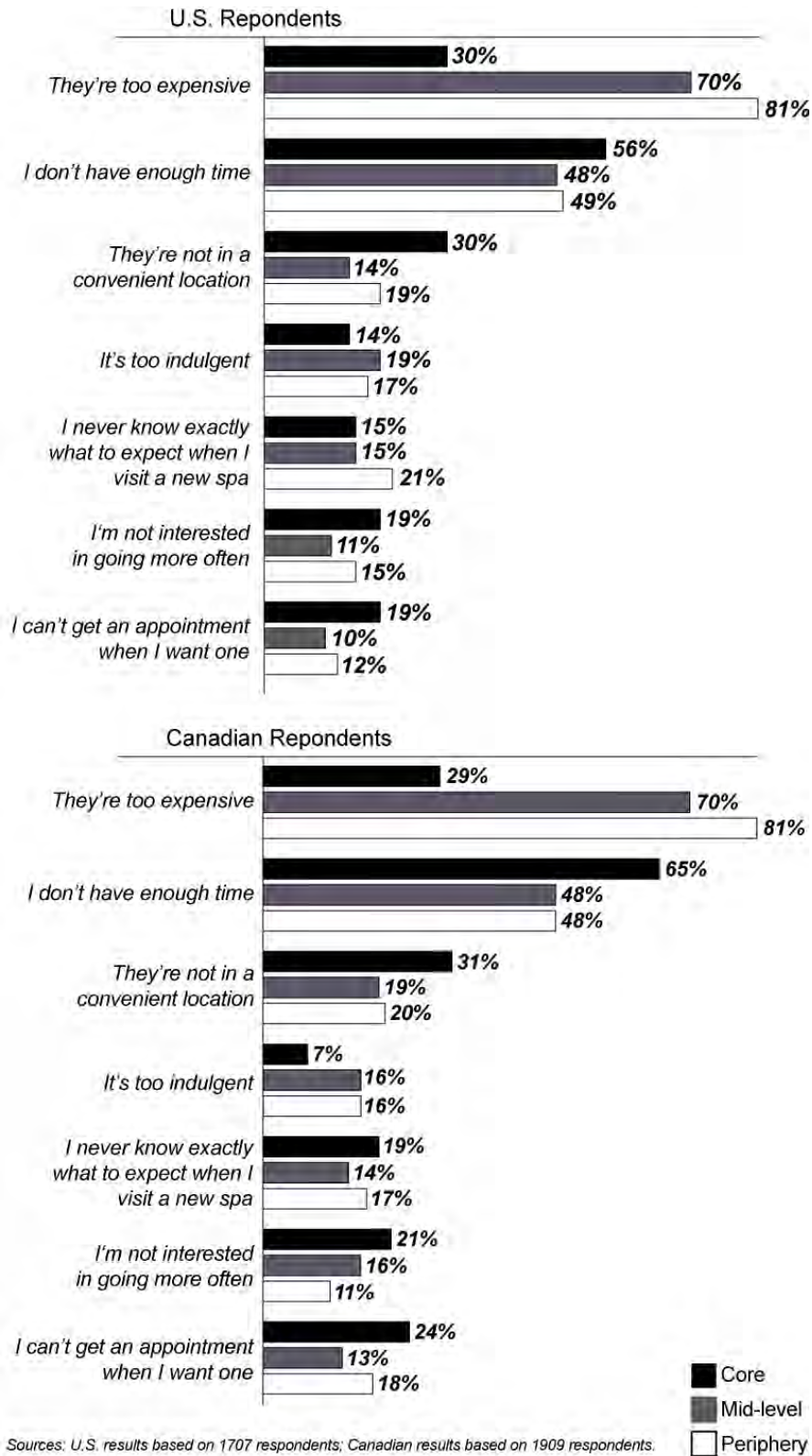
are the most distinctive across segments. Thus, stress reduction and wellness concerns are much more top of mind for Core spa-goers than they are for Periphery and Mid-level spa-goers. At the opposite end of the spectrum, we find Periphery spa-goers much more likely to emphasize appearance. These differences from Core to Periphery appear among both U.S. and Canadian spa-goers, though they are somewhat more pronounced in the U.S.

Figure 7
Top Reasons to Visit a Spa (By Segment)



Just as consumers participating at different levels in the Spa World differ in their reasons for going to spas, their reasons for not going also vary from Core to Periphery (see Figure 8). Core spa-goers are more likely to be hindered by practical considerations, such as lack of time or the lack of a conveniently located spa. Periphery and Mid-level consumers, on the other hand, find it much more difficult to reconcile the cost of going to spas, which is another way of saying that they fail to find as much value in the spa experience as Core spa-goers do.

Figure 8
Reasons Not to Visit Spas More Often (By Segment)



As might be expected, spa-goers' responses to one of the items ("I'm not interested in going more often") was strongly dependent on the frequency of their spa visits. In both countries, the more often spa-goers made visits to spas, the less interest they had in visiting them still more often.

Demographics

These results clearly show that participation in the Spa World does vary in intensity from Periphery to Core, yet they do not tell us what kinds of spa-goers end up in each of these segments. We know that Core spa-goers are more committed to a spa-going lifestyle than either Mid-level or Periphery spa-goers, but we don't know, for instance, if this is because spa-goers become more deeply involved in the spa world as they get older. Table 2 shows how different demographic characteristics may influence whether a spa-goer is more or less likely to be in the Core, Mid-level or Periphery of the Spa World.

Table 2
Spa World Demographics

	U.S.		Canada	
All Spa-Goers	Total		Total	
Spa World segment				
Core	11%		11%	
Midlevel	55%		51%	
Periphery	34%		38%	
Gender	Male	Female	Male	Female
Spa World segment				
Core	16%	9%	16%	8%
Midlevel	52%	56%	50%	52%
Periphery	31%	36%	33%	40%
Age	18-44	45 & Older	18-44	45 & Older
Spa World segment				
Core	9%	14%	13%	8%
Midlevel	57%	52%	52%	50%
Periphery	34%	34%	34%	42%
Marital Status	Not Married	Married	Not Married	Married
Spa World segment				
Core	10%	12%	12%	9%
Midlevel	55%	54%	50%	52%
Periphery	34%	34%	37%	39%
Ethnicity	Caucasian	Other	English-Canadian	Other
Spa World segment				
Core	10%	15%	8%	14%
Midlevel	54%	57%	53%	49%
Periphery	35%	28%	39%	36%
Education	No College Degree	College Graduate	No College Degree	College Graduate
Spa World segment				
Core	4%	13%	8%	12%
Midlevel	63%	53%	56%	48%
Periphery	33%	35%	35%	40%
Household Income*	Under \$75k	\$75k & Up	Under \$75k	\$75k & Up
Spa World segment				
Core	9%	12%	9%	13%
Midlevel	64%	51%	51%	51%
Periphery	28%	37%	40%	36%

*In currency of respondent's country

Sources: U.S. results based on 1707 respondents; Canadian results based on 1909 respondents.

Gender comparisons indicate that men are about twice as likely as women to be in the Core segment in both the U.S. and Canada. The differences at Mid-level are negligible, which suggests that women are more likely to enter and/or remain at the Periphery of the spa world than men are.

We do not find this result especially surprising in light of cultural stereotypes. It suggests that a larger percentage of men enter the spa world through gateway treatments and spa settings geared more toward Core and Mid-level involvement than toward the Periphery. For example, men are less likely to begin their journey with manicures and pedicures, but rather try out therapeutic massage services. The nature of this type of massage is seemingly oriented toward “getting work done” and not simple pampering. Thus, from the beginning, many men will enter the spa world with attitudes that hew closer to the Core than the Periphery.

The age differences between the U.S. and Canada make it unlikely that age per se explains spa-goers’ degree of involvement in the Spa World. While there appears to be evidence for an aging effect among U.S. spa-goers (i.e., that spa-goers become more Core in their involvement as they age), the opposite seems to be true in Canada.

Similarly, marital status, comparing married to unmarried spa-goers fails to follow a consistent pattern in both countries. Again, we interpret this to mean that marital status does not promote or hinder involvement in the Spa World.

Education presents an interesting view of participation in the Spa World. Those with higher education are more likely to be Core participants in the Spa World, but are not less likely to be at the Periphery. If anything, there may be a greater likelihood of peripheral involvement in the Spa World by spa-goers with higher education. This finding suggests that education itself (i.e., becoming more knowledgeable generally) does not necessarily increase the level of participation in the Spa World. Rather, there are some spa-goers with college or better education who become Core spa-goers while others remain at the Periphery.

Ethnicity does appear to differentiate spa-goers, with minorities more likely to become Core spa-goers and less likely to stay Periphery spa-goers. Unlike the differences between men and women, where men were also seen as more likely to become Core participants, ethnic minorities are not more inclined to start with Mid-level or Core spa services (e.g., therapeutic massage) than those more common to the Periphery (i.e., facials, manicures, pedicures). Results we do not reproduce here show that these minorities are just as likely to avail themselves of specific spa services as the main ethnic group when they first start going to spas. Thus, ethnic differences by segment indicate minorities take their journey into the Spa World farther toward the Core than the dominant ethnic group in each country, despite starting at essentially the same level of involvement.

Finally, we note that income shows somewhat different effects in the two countries. Whereas in Canada, income appears to support movement toward the Core, in the U.S., income acts more like education (i.e., higher income is both more likely to produce Core as well as Periphery

orientations to the spa world). We know that Core spa-goers are less likely to allow budget constraints to prevent their participation in the Spa World, but there is no question that those with high incomes have an easier time of it than those with more restricted incomes. What is interesting here is that higher incomes in the U.S. also keep a portion of spa-goers in the Periphery. Perhaps these particular spa-goers are attracted primarily to the indulgent, pampering dimension of the spa experience, essentially treating spas as another privilege of high status rather than a significant lifestyle dimension. In either case, these differences suggest that it would be a mistake to assume that high income necessarily leads to greater involvement in the Spa World.

Overall, we find that higher socio-economic status (SES), as represented by education, income and ethnicity does not consistently increase spa-goers' level of involvement in the Spa World. Higher SES does appear to allow spa-goers, who are so inclined, to pursue increasing interest in the Spa World, but it does not necessarily drive spa-goers to the Core. On the contrary, gender does show a consistent pattern across the segments, which indicates men are more likely than women to enter the Spa World closer to the Core and to subsequently continue moving toward the Core. Women, by contrast, have two entry points. One is more Mid-level and resembles the course taken by most male spa-goers. The other point of entry is at the Periphery and does not follow the same path that men take.

Key Findings

- About **fifteen percent** of the adult consumer population in Canada (14%) and the U.S. (15%) actively participates in the World of Spas.
- **Core** spa consumers view their treatments and experiences at spas as part of a larger wellness lifestyle, and even though they are not above being pampered, their main perspective of spas is in relation to health and wellness.
- **Core** spa-goers constitute only a small part of the total market, albeit one that tends to be the most vocal and the most willing to pay premium prices for their spa experiences which identifies them as spa trend-setters.
- **Periphery** spa consumers see their time at spas as largely indulgent (though perhaps necessary to balance an otherwise stressful life). For the most part, **Periphery** spa consumers have not made strong connections between their spa visits and their health and wellness.
- **Mid-level** spa consumers fall somewhere between these extremes, with some of their spa experiences linked to wellness pursuits and others decidedly intended as an Escape or Indulgence.
- Consumer evolution into the Spa World typically entails information gathering, experimentation, evaluation and lifestyle negotiation. Thus, not only do few spa-goers

enter the world at the Core, but migration towards the Core is an evolutionary process that takes years to achieve.

- Fewer than 10% of U.S. or Canadian spa-goers indicate being extremely comfortable with being shown spa products for purchase, waiting for a treatment and expressing concerns regarding a visit.

Distinctions Between Spa Types



This chapter deepens and expands insights presented in the 2004 ISPA report on spa-goer orientations to different spa types. The 2004 report focused on four retail versions of the spa: the At-Home Spa, the Beauty Hair Salon, the Day Spa and the Spa on Vacation. In this chapter, we expand this focus to include meanings and images commonly associated with the term “Spa” and four distinctive Spa Types well known to those in the spa industry:

- Day Spa
- Medical Spa
- Destination Spa
- Resort/hotel Spa

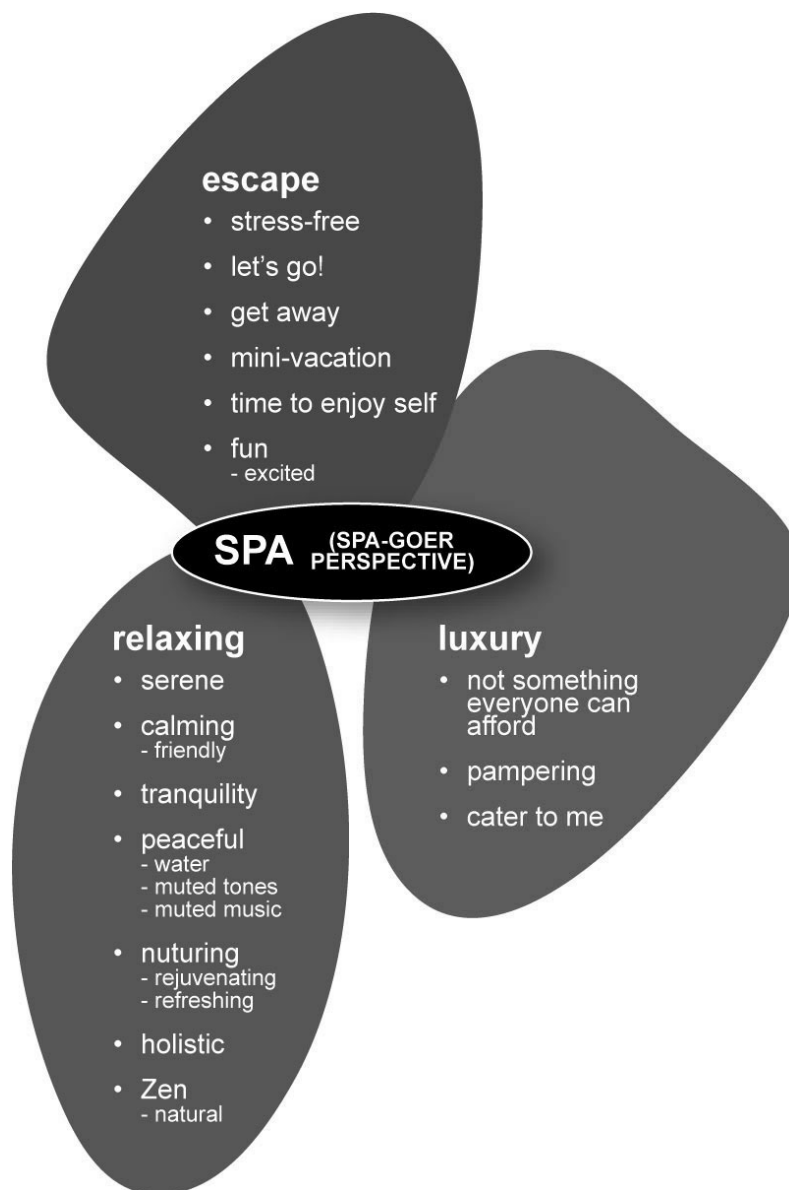
Each section begins with the “general perceptions” of spa-goers for each distinctive spa type. Following these brief discussions of general perceptions, we focus on distinctive themes and issues particular to each specific spa type and offer marketing recommendations appropriate to addressing them. We conclude the chapter with a key findings table designed for quick visual reference to the key features of Day Spas, Destination Spas, Resort/hotel Spas, and Medical Spas.

Perceptions of “Spa”

Key Language Describing “Spa”

The following language map depicts spa-going consumers’ images and associations with “spa.” A basic strategy for reading the map is to see the larger fonts on each map as primary associations. The smaller fonts represent sub-themes, excerpts of spa-goer speech, or qualifications of the main thought.

Figure 9
Spa Language Map



This language map reveals spa-goers' primary associations with "spa" are luxury, escape, and relaxation. All sub-themes are positive, and depict "spa" as a haven of calming tranquility in which spa-goers can enjoy themselves and be nurtured and pampered.

Spa-Goers Imagine Heightened Service Experiences

Due to these images and associations, spa-goers maintain exceedingly high expectations about their visits to spas. They expect deep gratification from spas, or something close to it, and not only because they consider spas generally expensive. Their high expectations derive, in part, from the way the word "spa" stands in their minds as a symbolic promise of unusually meaningful and pleasurable life experiences.

Though any given spa visit may be evaluated differently from the perspectives of Core, Mid-level and Periphery spa-goers, the term "spa" itself conjures shared meanings and images in the minds of most. The term inspires images of conscientious, professional staff, technicians, and therapists. It also conjures up images of sensually pleasing, relaxing environments and ambiance.

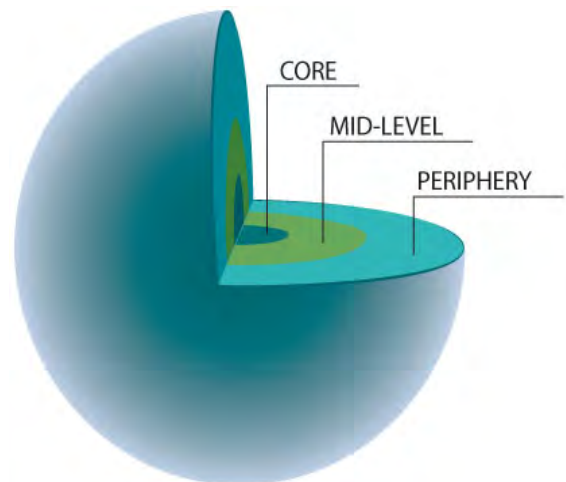
More than anything, however, spa-goers asked to reflect on the term "spa" narrate times and occasions when they were transported out of the realm of ordinary human experience and temporarily transformed into worthy recipients of care and considerate attention.

These idealized associations are held in common by:

Core spa-goers who routinely cultivate their souls at spas,

Mid-level spa-goers who intermittently retreat to spas from the grind of modern life, and

Periphery spa-goers who seek rare experiences of being pampered at spas.



Whether the term "spa" signifies Work, Escape, Indulgence, or a mix of all three, spa-goers generally conceive of "spas" as places they can go for deeply meaningful experiences that are largely unavailable to them elsewhere in life.

Perceptions of Day Spas

General Perceptions of Day Spas⁵

Typically, when asked to reflect on the term “spa,” spa-goers recall images of day spas. In this sense, the “day spa” serves as the spa archetype for the majority of the spa-going consumers with whom we spoke. Thus, all of the previously described positive images and meanings that spa-goers ascribe to the term “spa” apply to day spas, first and foremost.

Lifestyle Contexts Driving Spa-goers Spa-ward

Need for Reward

To adequately grasp the meaning of day spas to many spa-goers, especially Mid-level ones, it is important to understand the life contexts that motivate spa-going. In general, Mid-level spa-goers consider visits to day spas an extremely important feature of their lifestyles. They see themselves as “working hard” to actively accomplish what they have and who they are. It is vitally important to them that their emotional and psychological needs be consistently satisfied. They are generally unwilling to postpone personal gratification indefinitely. In this context, they view spa-going as a much deserved and hard-earned reward.



Home Doesn't Offer Rewards That Honor the Individual as an Individual

Spa-goers often find that neither work nor home are organized adequately to provide rewards that they feel entitled to as individuals. Home and work tend to offer rewards limited to distinct social roles (e.g. Mom, account manager, etc.) that do not capture the spa-goer's (or anyone's) full complexity as individuals. In fact, in the professional and domestic realms of their lives, spa-goers often find themselves—and others—*preoccupied* by stress and “hard work” and unable to actually tune in to their own needs. As a result, they often find themselves frustrated by the challenges that work-life and home-life pose to any lasting sense of being “taken care of” as individuals. In response, they turn to spas for what they desire elsewhere in life but frequently do not receive beyond the Spa World: social contact with empathic others who honor their identity *as individuals worthy of special care*.

⁵ Through-out this section on Day Spas, we will focus our analysis on Mid-level Spa-goers unless otherwise noted, since they are the largest segment of Spa-goers in North America. Specifically, in 2006, 55% of US Spa-goers and 51% of Canadian Spa-goers are Mid-level. (For more information related to consumer segmentation within the Spa World, see the 2006 Hartman Group report prepared for ISPA entitled, “ISPA 2006 Spa-Goer Study.”)

In this context, spas have value precisely because they are rare environments uniquely designed to help spa-goers “let go” and “relax” from the obligations of work, home and social life. Given how hard they work in all corners of their lives, spa-goers are apt to feel as though they “deserve” the special experiences day spas have to offer.

Squeezing a Spa Visit into a Busy Life

Given their busy lifestyles and their physical proximity to day spas, many spa-goers are compelled to squeeze spa visits into the busy flow of their lives. As a result, these spa-goers tend to experience their spa visits as compressed by external time pressures. In this context, a “get-in/get-out” orientation to spa visits is not uncommon. Core and experienced Mid-level spa-goers will sometimes arrange their entire lives on a given day to decrease or eliminate these time pressures. But Periphery and inexperienced Mid-level spa-goers often fail to understand that a get-in/get-out mentality can seriously detract from their ability to achieve a sense of Escape and enjoy the indulgent pampering of their visit.

Day Spas Often Exacerbate the Time Pressure

Many of the spa-goers with whom we spoke reported that some day spas have adopted a “pull them in, push them out” orientation to their clientele. Core and Mid-level spa-goers, especially, talked about this spa induced sense of time urgency as a turn off. Pressures to “keep it moving” during a visit work directly against the widely shared spa-goer orientation to spas as temporary oases in an otherwise frantic, stressful, and time-famined life.

Sampling, Seeking, Comparing: The Typical Orientation to Day Spas

Seeing What Else is Out There

Spa-goers, across all segments, tend to bring exceedingly high expectations with them to any day spa visit they make. As a result, the stakes of a given spa visit are high for the spa-goer as well as for the spa itself. Any negative aspect of a spa-goer’s visit to a day spa may lead her simply to never return again. This is not just a matter of personal preference, but is also reflective of the spa market place in urban areas. Because day spas have proliferated across urban landscapes, urban spa-goers can easily “shop around.” This means they are less likely to give up on the ideals of what a “day spa” is supposed to be and more likely to continue their search for a spa that provides what they’re looking for.

The Experimental Approach to Day Spa-Going

Though many of the Mid-level spa-goers we interviewed maintain an experimental approach to spa-going, they do re-visit day spas that provide first-rate experiences. In this context, it is not uncommon for Mid-level goers to use the “best spa they have been to” as a point of comparison

against which to evaluate their subsequent visits to other spas. Still, even if they enjoy consistently solid experiences at any given spa, they are unlikely to give up on their philosophy of “seeing what else is out there.” In this sense, Mid-level spa-goers are likely evolving over time as they gain experiences that allow them to compare and contrast various spas to one another. As a result, what seems like a good experience today may morph into a mediocre one over time as one gains broader exposure to a variety of spa experiences.

Emerging Quality Continuum among Day Spas

The proliferation of spas across urban areas also means that spa-goers are likely to encounter various types of spas. Most of the spa-goers we interviewed had been to several spas in their home cities. Core and Mid-level spa-goers had tales to tell of “high-end” spa experiences in which they were treated like sacred objects. They also had tales to tell about “Jiffy Lube” spas where they were treated impersonally and ushered quickly through the process. This suggests that a quality continuum among day spas is emerging in the collective mind of spa-goers.

Day spas that are primarily hair and nail salons stand out in this context as places where body treatments are risky ordeals. A primary concern here is substandard hygiene standards and expertise of the staff. Yet, if a day spa also offers hair salon services, then many spa-goers, especially Mid-level and Periphery ones, will consider them a valuable set of service options. At the same time, day spa’s need to manage the presence of salon services effectively in order to cultivate the impression that the spa-goer’s hopes for Escape from busy social life are understood and honored there.

Speaking the Language of the Day Spa

The following language map summarizes perceptions of the day spa in spa-goers’ own words/phrases. Overall, day spas are construed as a part of the spa-goer’s lifestyle in which they somewhat regularly seek out luxury, escape, and relaxation. Because the day spa is a lifestyle fixture, finding the best fit between spa and one’s unique circumstances and needs is important. Spa-goers have multiple day spas to select from and they are seeking value, which is defined as the best experience for the best price.

Figure 10
Day Spa Language Map



Perceptions of Destination Spas

General Perceptions of Destination Spas

To Periphery spa-goers, destination spas and resort/hotel spas are one and the same. Experienced Mid-level and Core spa-goers, however, distinguish between the two with the

understanding that destination spas tend to be secluded, health-focused operations removed from the hustle-bustle of urban cities and big towns. They also know that destination spas differ from resort/hotel spas in the way they completely immerse spa-goers in a temporary community of “like-minded” individuals striving independently towards a shared set of goals, such as lifestyle enhancements, health improvements, and/or self-renewal. Tellingly, to middle-aged and senior spa-goers, especially Mid-level ones, the term destination spa is still bound to conjure fuzzy historical associations with “fat farms” that are not very positive.

Major Draw: The Allure of “New” Treatments

Spa-goers may find “new” spa treatments at destination spas alluring simply because they are “on a journey” away from home.⁶ This push to experiment is supported at destination spas by other dynamics as well: local buzz, efforts to “fill time” with value, wishes to avoid repeated treatments during an extended visit, and yearnings to experience cutting edge treatments. It’s just as likely, however, that spa-goers will interpret treatments as earned rewards for eating right and exercising diligently. They may also be enticed to experiment with untried treatments and services that are directly connected to the changes they are attempting to make at the spa. In general, terms, spa treatments may promise intrinsic satisfactions, but destination spa-goers are apt to be drawn to them also as facilitators of sought after changes, rewards, “Escapes within escapes,” and means to experimentation.

Universal Unmet Need: Bridging the Gap between Destination Spa and Everyday Life

Core, Mid-level and Periphery goers alike express deep interest in making practical links between destination spas and their everyday lives. On the one hand, Mid-level and Periphery goers rely on products available at destination spas, such as exercise videos and cookbooks, as means to extend the effects of the spa visit back into their everyday lives. Without proper support systems in place at home, however, they soon find that their commitment levels to newfound health practices wane in the face of the “bad habits” and indulgent temptations of everyday life. In response to this gradual erosion of the spa’s influence on their lives, spa-goers are apt to experience a range of negative emotions, from self-blame to a sense of “being taken” by false promises. On the other hand, Core goers “drool” over the idea of destination spa practitioners collaborating with day spas in their home communities to provide a continuity of care customized around their particular needs and desires. Overall, destination spa-goers yearn for opportunities to link the intentions they bring to destination spas to the rest of their lives; at present, however, they find such connections weak or non-existent.

⁶ This insight applies with equal weight to Spa-goers at resort spas as well.

The Key Draw for Mid-level and Adventurous Periphery Goers

Lifestyle Overhauls

Core, Mid-level, and even a few Periphery spa-goers are attracted to destination spas for their holistic, engrossing focus on health and wellness. Mid-level and Periphery destination spa-goers, in particular, genuinely want to believe that trips to destination spas can result in enduring lifestyle enhancements and health improvements. They openly talk about “buying in” to the promise of personal transformation and self improvement associated with destination spa visits. In their eyes, destination spas offer rare opportunities to temporarily step out of the suboptimal habits and routines of modern living and into a world where everything and everyone exudes dedication to well-being while encouraging a deeper focus on self-care than typically allowed in everyday life. In this context, Mid-level and Periphery destination spa-goers often find themselves seduced by the belief that they are genuinely undergoing deep and lasting subjective and physical transformations while at the spa. As a result, they can become easily enchanted by products and advice offering practical means of sustaining newfound or rekindled health and wellness orientations upon reentry into workday life.

Key Draws for Core Spa-Goers

Lifestyle Tune-Ups

Core spa-goers generally do not orient to destination spa visits as opportunities for transformative life experiences. Instead, they tend to frame their visits to destination spas as extensions of their ongoing efforts to actively cultivate personal, and often spiritual, well-being in their everyday lives. Indeed, for Core goers, destination spa visits generally serve as “tune ups,” not overhauls.

Trend Monitoring

Equally important, for Core goers, destination spa visits are also likely to serve as extraordinary opportunities to learn about and experience cutting-edge trends in the broader Spa World (which is what the destination spa represents to them). At the same time, however, “hard core” goers may seek out deep, life altering change at specialized destination spas offering experiences unavailable anywhere else, such as a “rejuvenating” week of fasting in the desert combined with intensive colon therapy.

Key Periphery and Mid-level Concern: Is a Destination Spa Out of My League?

As attractive as a destination spa’s holistic, encompassing, and zealous focus on health, wellness and self-improving may be to many Core and Mid-level spa-goers, a range of Periphery and Mid-level goers find it intimidating. Sheila, for example, is an experienced Mid-level spa-goer who feels put-off by the prospect of visiting a destination spa. In her imagination,

destination spa personnel and clientele would evangelize hard-Core, uncompromising, and judgmental attitudes regarding her less-than-healthy lifestyle. She says:

A destination spa's a little intimidating to me because I'm not the overall healthy picture. I'm gettin' there. But, to me, that seems like people who are serious about, you know, the whole thing. I wouldn't expect to eat meat. You know, I feel like I'd be looked down on if I asked for a hamburger. Because I don't buy in—I don't want to say I don't buy in, I'm not dedicated enough to do the whole thing.

Sheila has trouble even imagining being able to tolerate her perceptions of an ultra commitment to wellness that a trip to a destination spa might entail. Not only would she feel out of place; she believes she would be morally evaluated. She adds, “*I don't want anybody talking to me about my aura being brown from all the meat I've been eating.*”

Key Mid-level and Core Concerns: Obstacles to Escape

Social Pressures

Beyond desires to Work on themselves, spa-goers are also driven to destination spas by yearnings to “get away.” They sometimes find, however, that the highly social character of destination spas conflicts with their drive to Escape the social pressures of mundane life. Some goers may feel pressured to participate in structured activities when they would prefer to withdraw and relax on their own. Some may feel incompetent in the presence of seasoned spa-goers for whom being at the spa seems to be second nature.

Economic Pressures

Others may feel on-the-hook to maximize the economic value of their limited time at the spa by participating in as many offerings as possible. Whatever the case, destination spas may afford spa-goers alluring opportunities to “get away,” but their social nature offers a slew of challenges to any spa-goers seeking an Escape from social life.

Tense Relations with Travel Mates

Some Mid-level spa-goers anticipate these challenges by traveling to destination spas in small groups of trusted companions. In theory, this “share an adventure together” strategy provides safeguards against mundane discomforts associated with pressures to socialize with strangers during a destination spa visit: they may co-participate in a new activity with a friend, sit for meals with family members, or meet up with trip-mates “in between” treatments. In various ways, spa-goers rely on solidarity with trip-mates to share and hence lessen any personal anxieties they may have about their trips. Of course, this kind of camaraderie is not foolproof, as tense relations between trip-mates can sometimes emerge. In such circumstances,

individualized spa treatments can not only help spa-going consumers Escape the broader social burdens of the destination spa, but also double as breaks from trying relations with travel mates.

Speaking the Language of the Destination Spa

The following language map summarizes spa-going consumer perceptions of the destination spa. Spa-goers' main associations with destination spa are holistic, transformation, rejuvenation, and get-away. Spa-goers believe this is the ultimate spa where one can expect the utmost in spa culture such as maximum seclusion and luxury, new spa experiences, and an all-encompassing mind/body/spirit transformation that will alter their lifestyle once back at home.

Figure 11
Destination Spa Language Map



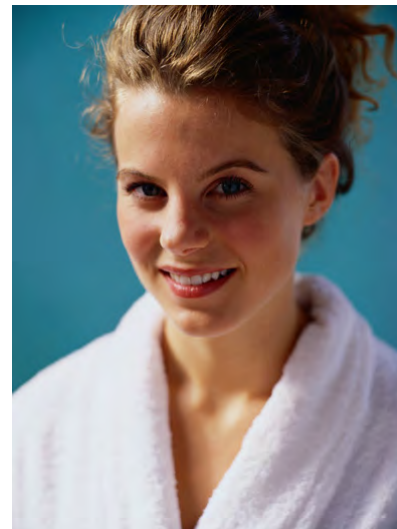
Perceptions of Resort/Hotel Spas

General Perceptions of Resort/Hotel Spas

As mentioned above, spa-goers tend to equate destination spas with resort/hotel spas. However, not all spa-goers exhibit this confusion. Whether traveling on vacation or away on business, knowledgeable spa-goers at all levels perceive of resort/hotel spas as matching or exceeding the qualities of high-end day spas with which they are familiar.⁷ In part, these perceptions derive from the way consumers expect hotels in resort locations—and perhaps entire tourist economies in resort areas—to fulfill their wishes, anticipate their needs, and empathically attend to the details of their sensorial experiences.

Two Primary Groups of Resort/Hotel Spa-goer: Vacationers and Business Travelers

Whereas destination spas center on immersive social experiences from which it can be difficult to withdraw, resort/hotel spas tend to be far less integrated into the daily affairs of their clientele. In general terms, spa-goers tend to portray resort/hotel spa treatments and services as augmentations to the one or the other primary purpose of their visits to resort locations: vacation or business. Whether traveling for business or pleasure, spa-goers do not typically organize their journeys to resort locations exclusively around resort/hotel spa offerings. As a result, resort/hotel spas must compete for their time and money with an array of alluring, non-spa related activities, such as beach going, sightseeing, or simply lounging over cocktails.



As vacationers, spa-goers are likely to be anywhere in the Spa World. As business travelers, they are most likely to be Mid-level and Core spa-goers given their central attraction to the Escape driver.

Universal Concern: Risk of Poor Value

Spa-goers generally assume a high-end character to resort/hotel spas that often lead them, especially Mid-level and Core ones, to become unusually attuned to the details of the spa's

⁷ Changing rooms may provide an exception to this point. Many of the resort/hotel Spa-goers we interviewed talked about lackluster changing rooms at the resort/hotel spas they have visited, but the luxurious nature of their nearby hotel rooms can offset this potential disappointment.

internal environment and the professional demeanor of the spa's personnel. This perception is reinforced by what often appear to be extremely pricy offerings compared to similar services at the day spa "back home." All this combines to heighten the standards that resort/hotel spa-goers use to evaluate the value of their treatments. Consider the words of Lucy, a Core goer, on the way the high price of massages at resort/hotel spas tends to intensify her sensitivity to any imperfections in the spa environment:

It was like a \$200 massage. I remember going, what is a \$200 massage? I can't wait to find out. [...] If there was something really disappointing, like if the room was too sterile or if there was extra noise. If there just wasn't every detail paid attention to, then my level of disappointment would rise.

Because spa-goers believe that prices tend to be higher at resort/hotel spas, any aspect of an actual resort/hotel spa visit that proves incongruent with their expectations for pristine spa experiences runs a great risk of degrading the overall value of the spa in their minds. In fact, when a spa-goer's price-driven expectations grossly transcend the quality of her actual spa visit, she is likely to interpret the price of the treatment as grossly inflated, maybe even a rip-off.



Key Drivers to Resort/Hotel Spa Visits for Vacationers

Let's Try a Spa!

Consumers who have long wondered what a spa is all about are more likely to try it out in the overall indulgent context of vacations. This is because most spa-goers enter the Spa World through the Periphery and its strong orientation to pampering. Yet, these new spa-goers still possess significant barriers to spa-going (see Chapter VII. on Non-Spa-Goers) that even a resort/hotel spa needs to be adept at addressing.

Obtaining the "Day Spa" Experience Conveniently Without Time Pressure

For Mid-level and Core spa-goers, spa-going on vacation at a resort eliminates the Time Pressure and the shopping for spa experiences that affect the likelihood of ever getting to the

spa at home or of truly enjoying it. The primary risk is that a poor spa experience could sour their experience of the resort and of their vacation.

Experimenting with Indigenous Treatments

Virtually anyone in the Spa World might try out authentic services only possible at the resort/hotel spa, especially those that transpire in the natural environment and/or use fresh natural ingredients/substances to enhance a treatment's efficacy. In addition, services that originated in the cultural region of the spa (e.g. Thai massage) are likely to be perceived as more authentic than the same service offered "back home."

Key Barriers to Resort/Hotel Spa Visits for Vacationers

The Flow of the Vacation Itself

Because resort-setting consumers are actively courted by multiple segments of local tourist economies, they can be picky about how to fill their precious time. In this context, Mid-level and Periphery vacationers who can "take or leave" spa experiences may find that visits to resort/hotel spas must be consciously "worked in" to the broader flow of activities that constitute their trips. In this context, it is not uncommon for Periphery and Mid-level consumers to experience ambivalent feelings about foregoing appealing options, including "doing nothing," to enter the institutional setting of a spa. For vacationers, in particular, the practical fact of having to engage a resort/hotel spa's insular social system and unfamiliar world of rules and etiquette may feel too formal and disconnected from the foot-loose mood of their travels.

Vacations have moral and pragmatic underpinnings that can influence the way vacationing Periphery and Mid-level spa-goers orient to spas. Specifically, consumers do not want to feel the need to "step out" of the flow of their vacations to indulge themselves or relax. Having to do so feels too much like work and thus threatens to drag down the experiential value of the vacation. In this context, some consumers appreciate opportunities to have spa treatments performed in the comfort and privacy of their hotel rooms. Other consumers, particularly those for whom vacation means "being outside," find themselves drawn to massages in open-air huts set off from their hotels or opportunities for soaks in outdoor hot tubs. Some adventurous consumers even appreciate opportunities to arrange



treatments in exotic or unusual outdoor locations, particularly if such locations emblemize indigenous experiences distinctive to the local scene.

The Alluring Charm of the Great Outdoors

As a rule, the more vacationers frame the heart of their trips as “happening outdoors,” the less likely they are to prioritize voyages into a spa’s inner sanctum. They are more likely, instead, to be drawn to spa treatments that happen completely or partially outdoors. Indeed, consumers highly motivated to be “outside” while on vacation appreciate it when spa experiences are effectively (or symbolically) integrated into both the resort’s “natural habitat” and the “natural” rhythms of their vacationing. For some consumers, that is, stepping into the institutional confines of a spa symbolizes stepping out of the heart of vacation. Even for these consumers, however, privacy issues remain especially salient in outdoor or partially outdoor spa experiences, especially massages.

Key Drivers for the Business Traveler: Need to Escape

In contrast to some of their vacationing counterparts, hotel-staying business travelers are apt to deeply value the physical and symbolic boundaries that separate the internal world of the resort/hotel spa from the energy and activities that characterize the broader resort environment. Consider, for example, the words of Marnie, a Core goer, as she reflects on her intentions to use resort/hotel spas as breaks from work and the activities and vibe of vacationers:

I want that other ‘I’m in another place now.’ That being said, I’ve enjoyed getting massages outside, as long as it’s somewhat in the insular walls of the spa. I’m not interested in being with the resort goers and having my massage on this little roped off area where on the other side of the rope somebody else is doing their loud vacation thing. I’d rather have a more serene experience.

Marnie’s quote reflects what is generally true for spa-goers on business trips: they are likely to treat their visits to resort/hotel spas as short-lived emotional journeys that temporarily carry them out of uneasy life conditions and into more “serene,” balanced and, perhaps, indulgent experiences. The more convenient and accessible the spa, the better, especially if the spa experience is physically and symbolically removed from extraneous stimuli. In this sense, business resort/hotel spa-goers exhibit motivations similar to those that drive Mid-level spa-goers to day spas in their local communities: as an Escape lightly touched by Indulgence and focused on stress-reducing Work.

Key Barriers for the Business Traveler: Need to Escape

The Spa Caters Too Much to Vacationers

If the spa does not maintain the more serious character of the day spa “back home” that they prefer, they may not choose to purchase services on their trip. The presence of children, especially, is likely to be a turn-off for this group. Spas that share changing rooms with pool areas can generate this user conflict quite easily. Spas that open up onto public resort areas likely to have loud noises or any noises associated with vacationing groups can disturb the sense of Escape that business people are trying to achieve while on their trips.

Services are too Geared Toward Indulgence

Business travelers at the resort/hotel spa want a menu that allows them to achieve Escape and Work. Well trained therapeutic technicians are expected and body work will be more of interest to them than cosmetic skin treatments, unless their profession requires a lot of public speaking and/or face-to-face client interactions.

Cross Cultural Resort/Hotel Spa Experiences and Spa-goer Expectations

An exception to high expectations at resort/hotel spas comes from spa-going consumers traveling in developing countries. Several spa-goers told us how they lowered their expectations at spas in Mexico, Thailand, and the Dominican Republic, for example. These lower expectations are, in part, due to the lesser relative costs of treatments and services at spas in developing countries compared to treatments and services at spas “back home.” In the context of trips through ‘exotic,’ ‘less developed,’ foreign lands, these spa-goers tended to interpret their spa experiences in the light of inexpensive prices as either pleasant surprises or understandable disappointments.

Despite their relatively low expectations about quality, these goers did not give up hope for interesting experiences. Instead, traveling spa-goers in developing countries oriented to spa-visits with a sense of adventure and desire to participate in authentic, indigenous experiences. In this context, spa-goers tended to temporarily suspend the standards and expectations they typically bring with them to North American spas. Thus, even if their experience proved to be sub-par, they could easily chalk it up to cultural differences and frame it as a “learning experience” and a “story to tell.” Overall, this acceptance of suboptimal spa experiences is prefigured by a deeper sense that the entire way of life in the host country is below or behind the spa-goer’s country of origin. In other words, ethnocentrism provides a framework in which disappointments become palatable and satisfactions become delightful due to the goer’s sense of cultural superiority.

Alternatively, though we did not interview spa-goers who had visited spas in “developed countries” outside of North America, we suspect that many North American spa-goers, especially Mid-level and Periphery ones, would expect these spas to be essentially similar to the high end day spas they encounter in their home communities. On the flip side, Core and experienced Mid-level goers might orient to, say, spa-going in Europe or the Mediterranean as an opportunity to make contact with a deeper, more authentic, and “traditional” culture of spa-going than is generally available in North America. (In Chapter VI, we discuss consumer experiences and expectations in cross cultural perspective as a potentially illuminating avenue for further research on the Spa World.)

Speaking the Language of the Resort/Hotel Spa

The following language map summarizes perceptions of the resort/hotel spa. Resort/hotel spas are primarily associated with indigenous spa experiences, getaways from life and/or work, and spa-going consumers tend to equate resort/hotel spas with destination spas. Resort/hotel spa experiences are viewed as potentially different from all other spa experiences depending on the geographic location of the resort/hotel spa. Consequently, expectations of resort/hotel spas vary considerably.

Figure 12
Resort Spa Language Map



Perceptions of Medical Spas

General Perceptions of Medical Spas: The Anti-Spa?

In reality, many different kinds of medical spas exist, including various high-end establishments. Yet, though some spa-goers maintain accurate images of medical spas, many have either never heard of them or else maintain unfavorable misconceptions of them. Perhaps the most common *misconception* of medical spas is that they provide intensive care exclusively to cancer patients, the terminally ill, and people recovering from traumatic life events. Though spa-goers admire these off-base images of medical spas on a communal level, they find them fundamentally repellent on a personal level. From the perspective of many spa-goers, medical spas are gloomy spaces full of sick and injured people—i.e., hospital-like settings that should be avoided.

Are Medical Spas Really Spas?

Such misperceptions of medical spas derive, in part, from what spa-going consumers consider the contradictory notion implied by the label “medical spa.” Simply put, “medical” and “spa” don’t go well together in the minds of consumers. Actually, the word “medical” casts a chilling shadow over the warm associations spa-goers maintain with the indulgent and escapist qualities of the Spa World. To some knowledgeable spa-goers, in particular, medical spas are not really spas at all, but rather specialized medical clinics that have inappropriately classified themselves as spas. Medical spas, after all, are essentially irrelevant (in the minds of many) to spa-goer yearnings for Indulgence and Escape and cater exclusively instead to desires for serious Work that is often perceived of as painful and risky.



The Key Draw for All Medical Spa-goers: Closing the Gap between Self Image and Self Reality

Strong Desires for Serious Work

From the point of view of many spa-goers, medical spas tend to be stark and clinical in character, especially when contrasted with the soulful ambiance commonly associated with other spa types. Some medical spa-goers see themselves as tolerating the absence of genuine

spa-like qualities in medical spas because of their immoderate desires “to get Work done.” Often, products they’ve tried in the past have failed to resolve their problems satisfactorily and treatments they’ve received elsewhere have proven ineffective. Occasionally, they simply get seduced by the buzz surrounding new treatments. One way or another, they turn to medical spas with the hope that medical science will help them narrow the gap between the way they *want* to look and feel about themselves and the way they *actually* look and feel about themselves. Perhaps they seek remedies for chronic issues with which they’ve been coping for some time. Or perhaps they “need” help in their struggles against the signs of aging or stress. Whatever the case, medical spa-goers tend to portray themselves as turning to the “the big guns” of medical science to resolve perceived problems with public aspects of their bodily appearance.

The Work of Medical Spas is Beauty

The word “spa” has many pleasant associations such as calming, soothing, relaxing, indulgent, and pampering. However, spa-goer images of the medical spa are quite different. The medical spa is often seen as a “last resort” for attaining a physical state that is seemingly unachievable through conventional spa treatments. In particular, significant



improvement to the quality of one’s skin is a major motivator for seeking out services from a medical spa. These improvements include permanent hairlessness, even skin tone, minimized facial lines, scar reduction, vein repair, etc.

Some spa-goers associate the seriousness or risk of medical spa treatments (e.g., Botox, microdermabrasion) with the seriousness and risk of plastic surgery. In their minds, these activities are one step removed from plastic surgery, an industry that they perceive of as almost exclusively associated with the pursuit of beauty rather than wellness. In this sense, the world of beauty intersects with the Spa World most obviously at medical spas. This means that the Work driver within the Spa World generally becomes less about a long-term commitment to one’s overall wellness and more about one’s commitment to attaining a beauty ideal. In the eyes of some spa-goers, the problem with beauty is its associations with an industry that many consumers perceive to promote vanity, artificiality, and superficiality. Spa-goers who patronize medical spas tend to identify with the quest for beauty at some level.

- **The Confident:** For some medical spa-goers, beauty aspirations are at one with their holistic view of themselves. In other words, a beautiful exterior is as important to their overall wellbeing (physical, emotional, spiritual) as a healthy interior.
- **The Ambivalent:** For other medical spa-goers, tension exists because a preoccupation with beauty seems at odds with their sense of themselves and their wellness commitments. These spa-goers question themselves extensively before partaking of medical spa services. They ask themselves, “Am I this kind of person?” “Am I shallow to want to do this?” “What will other people think?” At odds are the superficiality of beauty aspirations and the holism of their wellness ideals. This kind of medical spa-goer orients to beauty as a ceaseless treadmill in which time, energy, and money are repeatedly spent on the unachievable standard. This is especially troubling if the medical spa-goer identifies herself as an independent, thoughtful, and otherwise self-determined being. Consequently, the medical spa poses an interesting psychological challenge for these medical spa-goers.

Trepidations about Medical Spas

Perceptions of Risky Treatments and Unanticipated Consequences

With the possible exception of therapeutic massage and some body wraps, spa-goers tend to think of medical spa treatments as risky. As a result, early forays into medical spas are apt to lead spa-goers out of their comfort zones.

- Periphery and inexperienced Mid-level medical spa-goers, in particular, may find themselves preoccupied with worrisome questions when approaching medical spas: “Will it hurt?” “What are the side effects?” “Can any permanent damage be done?”
- Even for experienced Mid-level medical spa-goers, however, the sheer fact of receiving certain medical spa treatments (e.g., Botox, plastic surgery) can inspire a rash of trying questions related to personal identity. They may struggle with questions like, “What type of person am I for getting these kinds of treatments?” “Am I superficial or vain?” Such worries are apt to be put aside, however, should chosen treatments “work.”
- At the same time, Core spa-goers may continue to worry about the long-term effects of any treatments lacking long-term safety track records.

In general terms, medical spa treatments are apt to represent the possibility of short-term physical, emotional, and psychological risks to Periphery and Mid-level goers and the possibility of long-term unanticipated consequences to Core goers.

Worries and Delayed Gratification of Desires for Serious Work

Newbies to medical spas will likely contemplate and anticipate “getting Work done” at a medical spa for quite some time before committing to the process. It is the rare individual who will visit a medical spa in person without first researching available treatments, inquiring about treatments within social networks, and/or closely inspecting related information available online. (For this reason, the websites of medical spas are apt to play an important role in the decision making processes of interested consumers.) It is also likely that a medical spa-goer will have consulted with one or more medical spa representatives on the phone prior to visiting a spa in person. In this sense, medical spa-goers tend to be relatively educated consumers, at least when it comes to the specific treatments of interest to them. As a result, they are apt to frame initial paid consultations with medical spa specialists as extensions of their “fact finding” efforts.

Being Turned-Off by Turned-Up Sales Pressure

Because spa-goers have to pay for medical spa consultations up-front, the consultation runs a great risk of becoming disappointing because what the spa-goers wants may be deemed inappropriate by the medical spa specialist. (Typically, fees for consultations at medical spas are applied to the cost of the treatment.) When this happens, much of the spa-goers’ background research can be rendered instantaneously irrelevant. In such circumstances, it is not uncommon for spa-goers to experience pressure to select treatment options about which they are relatively uninformed.

Medical spa-goers routinely encounter heavy sales pressures in and out of the consulting room at medical spas. Sometimes they discover the profit driven nature of medical spas in consultations with spa personnel who push treatment series or otherwise expensive treatments on them. More generally, however, they encounter medical spa staff outside the context of the consultation who press them to purchase trendy products or “the latest” treatments. As a result of these overt sales pressures, spa-goers report having trouble determining whether medical spa personnel, including doctors, are caring for their personal needs or preying on their psychological vulnerabilities. In response, many spa-goers become emotionally guarded during their interactions with staff members.

Overall, medical spa-goers will tolerate the stark clinical character⁸ of the medical spa for the sake of Work, but they will be turned stone cold by anyone they perceive as pushing products and treatments on them in response to sales pressures or in the name of profits and commissions.

⁸ We acknowledge there is a diversity of medical spas within the industry, however, spa-goers’ overriding impression of medical spas is stark and clinical.

The following language map summarizes spa-going consumer perceptions of the medical spa. Medical spas are associated with serious Work and medical-like problems, environments, and solutions. Many themes have negative connotations and the overall image is of an unpleasant, high pressure, or scary experience.

Figure 13
Medical Spa Language Map



Key Findings

Overall, the Spa World is marked by diversity within a common framework. The common framework derives from the shared meanings spa-goers attach to the term “spa.” Though the term spa tends to inspire positive associations among members of the spa-going population, spa-goers do recognize substantial differences across spa types, not all of which are positive or based in fact. The grid below offers a synthesis of key findings by spa type. Order of arrangement is not significant to importance or ranking of insights.

DAY SPAS	DESTINATION SPAS
<p>General Image: Proliferation across urban landscapes means multiple images abound</p> <p>Who in the Spa World?: Periphery, Mid-level, Core</p> <p>Drivers: Indulgence, Escape and Work all relevant</p> <p>Distinct Role: Relaxation, stress relief, me-time; spa archetype against which other types are compared; lifeline and gateway to the Spa World</p> <p>Recurring Problems to Address:</p> <ul style="list-style-type: none"> • Help Mid-level and Periphery spa-goers overcome a “Get-In/Get-Out” orientation. • Time pressures sabotage a spa-goer’s ability to savor the Escape driver 	<p>General Image: Not distinct from resort/hotel spas to those who haven’t been to a destination spa already, but the “ultimate” spa to those who understand its unique offerings</p> <p>Who in the Spa World?: Mid-level to Core</p> <p>Drivers: Indulgence, Escape and Work all relevant</p> <p>Distinct Role: Lifestyle enhancement, wellness transformations, exposure to latest trends for Core</p> <p>Recurring Problems to Address:</p> <ul style="list-style-type: none"> • Pressure to integrate socially at these spas clashes with the Escape Driver • Newbies: Wealth of options leads to slight pressure to constantly participate, compromising feelings of relaxation and sense of Escape

RESORT/HOTEL SPAS	MEDICAL SPAS
<p>General Image: Exotic locations, Winter locations/times OK, Next to action in cities/towns</p> <p>Who in the Spa World?: Periphery, Mid-level, Core</p> <p>Drivers: Indulgence, Escape and Work all relevant</p> <p>Distinct Role: Complement to vacation experience or relief from travails of business travel</p> <p>Recurring Problems to Address:</p> <ul style="list-style-type: none"> • Tend not to be integrated well into the vacation experience. • They demand that you suddenly follow rules/etiquette and have obligations that are too formal and disconnected to the foot-loose mood of the locations where these spas tend to be • For business travelers, presence of vacationers undermines experiential value of visit • Spa-goers expect to pay more/less • Expectations of quality services vary with prices/geographical location 	<p>General Image: Misperceived generally as for cancer patients or terminally ill; Sub or post-surgical work intensity</p> <p>Who in the Spa World?: Experienced Mid-level and Core</p> <p>Drivers: The Work Driver becomes more intensively defined, especially in a cosmetic sense</p> <p>Distinct Role: Closing the gap between self/body image and self/body reality</p> <p>Recurring Problems to Address:</p> <ul style="list-style-type: none"> • Hard sell environments • Paid consultation before beginning can create disappointment, if what they thought they wanted isn't declared to be appropriate • Very clinical, not spa-like • "Medical" is problematic in its associations • Discovery that treatments are very expensive and serial creates disappointment

Recommendations

Day Spas

- Help day spa-goers avoid harried spa visits by offering and marketing aggressively priced 3-4 hour early morning packages designed to target the Escape driver and tap into mind-body wisdom of early morning ritual wellness practices.
- Provide buffer time between appointments so that spa staff members do not have any objective excuse for appearing harried.
- Market less tightly packed schedules as a matter of course to appeal to spa-goers worried about a "Jiffy Lube" experience at the day spa.

- Exploit the widespread experimental approach to day spa-going by cultivating loyalty to the spa industry as opposed to specific spas. (See the section of this report entitled “Evolving Deeper into the World” for recommendations on how to accomplish this.)
- Concentrate efforts on providing clientele on all levels with finely structured experiences throughout their visits to day spas.

Destination Spas

- Create alliances between day spas and destination spas to help destination spa-goers link the intentions they bring to destination spas to the rest of their lives through.
- Don’t over-promise lifestyle transformation in marketing materials to Mid-level and Periphery goers. Offer more sober glimpses of pragmatic health and wellness lessons to be learned.
- Showcase in marketing materials individual spa-goers who have come there and actually integrated what they’ve learned at home in brochures, web sites and other marketing efforts.
- Consider offering customized wellness diagnostics that would help naïve destination spa-goers understand where they are at upon arrival and make better use of services while they are there.
- Promote availability of “latest trends” to satisfy cravings of Core goers seeking new, potentially deeper and illuminating experiences in the Spa World.
- Tap into the destination spa-goer’s adventurous spirit, by encouraging them to experience treatments that are new to them.

Resort/Hotel Spas

- Promote product offerings that can fulfill the function of an “archeological gift” (i.e., something they wouldn’t otherwise find in their everyday setting).
- Promote distinctiveness of resort/hotel spas in relation to destination spas.
- Tap into the resort/hotel spa-goer’s adventurous spirit, by encouraging them to experience treatments that are new to them.
- Integrate services into the mood and flow of activities that constitute the resort visitor’s vacation.
- Respect the business traveler’s need to Escape from the energy and activities of others who are on vacation.
- Offer opportunities to experience the outdoors while engaging in spa treatments.

Medical Spas

- Promote medical spas as expert sites where spa-goers can purchase customized skin care products formulated to meet their unique needs and concerns.
- Promote medical spas as centers of information about cutting edge medical trends and scientific knowledge related to beauty treatments, products, and lifestyle.
- Master more effective ways to sell services and products so that spa-goers are less defensive in the context of medical spas. For detailed information on how to do this, see the section of this report entitled, “Mastering the Art of the Spa Sell.”
- Counter widespread misperceptions of medical spas by promoting more accurate images of the treatment and services offered at medical spas.
- Consider altering the “medical spa” label in such a way as to pique the interest of consumers currently turned off by medical associations and to maintain the loyalty and interest of those currently drawn to this spa type.

A Deeper Look at Nuances of the Spa Experience



IV

Expectations of a Guided Experience

The *ISPA 2004 Consumer Trends Report*⁹ outlined critical experiential points in the spa experience on which consumers evaluate their experiences. These critical experiential points, from pre-visit through post-visit, are further discussed here to highlight the necessity that spa-going is a guided experience. If spa-going is an emotional journey, then spa-goers on all levels clearly and strongly expect that spa personnel will guide them through it. Repeatedly, we heard spa-goers insist that the quality of a spa visit hinges in large measure on the way spas structure or fail to structure the stages of their visit and the transitions between the stages of their visit as well. Whenever the structured character of a spa visit breaks down, however slightly, spa-goers experience feelings of awkwardness, anxiety, neglect, incompetence, even of being lost. Our research indicates that effectively structuring a spa-going consumer's visit to a spa is an extraordinarily important dimension of customer service, perhaps the most important.

⁹ *ISPA 2004 Consumer Trends Report: Variations & Trends on the Consumer Spa Experience* is available at www.experienceispa.com




Pre-Visit

Some spa-goers begin searching for order and structure in their spa experience prior to physically arriving at the spa. Goers who are visiting a spa for the first time or receiving a new treatment, in particular, will very often search their social network connections and spa websites for clear descriptions of what their experience will be like. Few of the spa-goers we interviewed, however, can easily find the kind of information they seek on spa websites. What they want, but cannot usually find, are narrative descriptions (i.e., beginning, middle and end) of the overall structure of a typical visit to the spa, as well as visual images with text, possibly even video, portraying the process and stages of treatments.¹⁰

Once Core and many Mid-level spa-goers commit themselves to a spa visit, they will very often ritually prepare for it beforehand. Specifically, several of the spa-goers we interviewed told us that they would shave their legs (women) or backs (men) prior to getting a massage. Reportedly, ritually preparing one's body prior to a visit anticipates potential feelings of embarrassment that could undermine the experiential value of the treatment. It is conceivable that Periphery consumers will not know enough to prepare themselves in this way prior to a visit. As a result, they run a risk of "learning the hard way" that, say, shaving before a massage wards off feelings of embarrassment or body shame.

Arrival and Intake

The thirst of spa-goers for order and structure is evident upon arrival as well. They greatly appreciate being greeted by attentive, professional personnel for whom the spa seems to be a natural habitat. If the receptionist is bumbling, unpolished, overly busy, distracted, or snooty the spa-goer is apt to feel emotionally dinged and perhaps frustrated or even insulted. From the get-go, then, spa-goers want to know that the spa is a tight ship with a sound structure, ready and able to take them on the experiential journey they expect.



Experienced **Mid-level** and **Core** spa-goers will be easily turned off by receptionists involved in affairs and matters extraneous to the needs of clients at the reception location.

Intake and Repeat Customers

Spa-goers who have previously visited a spa are sometimes disappointed when, during the intake process, their return customer status goes unrecognized by spa personnel. In fact, some of the goers we interviewed clearly articulated strong desires for spa personnel to not only recognize them as repeat customers, but also to display familiarity with their previous visits,

¹⁰ This is especially true of Mid-level and Periphery Spa-goers with interests in treatments requiring them to be naked. Above all else, they want to know how their personal privacy will be managed throughout the treatment.

level of participation in the Spa World, distinctive needs/desires, and frequency of visits. Further, the spa-goers we interviewed agree that spas should keep active records of their previous visits, including information on treatments received and products purchased, and use these records to customize their subsequent spa visits, starting during the intake process. To repeat customers, when spas treat them “like everyone else,” the spa misses an opportunity to raise the experiential value of their visit.

Intake and ‘New’ Customers

The perceptions and experiences of repeat customers shines light on how the intake process can serve as an opportunity to not only gauge a client’s purpose and level of comfort and involvement in the Spa World, but to organize the client’s visit with this information in mind. With information gleaned during the intake process, spa personnel can more effectively customize the language they use and monitor the assumptions they make about a client’s understanding of the process and activities that constitute the visit. In general, a goer’s level of participation in the Spa World significantly shapes her experience and expectations of a particular visit. As such, a spa’s ability to discern a client’s place in the Spa World during the intake process represents an opportunity for spa personnel to learn how to structure a goer’s visit in an optimal and personalized way.

Transitional Moments

While spa-goers consider the highlight of any visit the treatment(s) itself, the experiential importance of transitions between each stage of a visit should not be underestimated. When not carefully facilitated, transitional points in a visit often give rise to moments in which spa-goers feel as if they “do not know how to act.” Thus, seemingly innocent instructions to “wait for your therapist in the lounge” or “to take as long as you’d like” can inspire feelings of awkwardness. The reasons for this are varied. Perhaps the spa-goer is accustomed to the way other spas operate. Perhaps the spa-goer is not evolved as a spa-goer and feels like a fish out of water at spas. Perhaps the spa-goer expects to be micro-managed throughout the visit. Whatever the case, careful attention, clear explanations, and physical guidance should be given to spa-goers, even experienced ones, during transitional moments of

Personal Belongings & Identity



Asked to disrobe in a treatment room, a male spa-goer we interviewed was deeply impressed when a spa offered him a high-end garment bag in which to store his belongings. This “nice touch” boosted his sense of loyalty to this particular spa. It also suggests a broader point: the personal belongings of a Spa-goer are extensions of his identity and should be treated with the same respect as his body and mind. Thus, if the treatment room doubles as a changing area, proper provisions should be easily accessible for storing personal belongings during the treatment.

their visits. If spa-goers must wait before entering a spa's inner sanctum, for example, they would generally prefer to be escorted to a waiting area, even if it is close by, rather than simply being pointed towards it.

Moving from One Host to Another

Spa-goers expect spas to clearly structure their experience and to guide them through that structure. Thus, when spa-goers are passed from one employee to the next, their transition should be marked with introductions and explanations and punctuated by the usage of first names. If they are new to the spa, they will appreciate a brief but thorough tour of it, including sections and spaces they are unlikely to use on this specific visit. Simply being shown the "lay of the land" has a calming effect on uneasy spa-goers. If they need to use a restroom, they will appreciate an escort who waits for them. In fact, the spa-goers we interviewed appreciate when spa employees wait for them by the door of any room they have entered for privacy. They further appreciate when these employees shepherd them back into the flow of their visit.

The Treatment

Once inside a treatment room, spa-goers also appreciate therapists and technicians verbally disclosing the structure of the treatment to them. By the simple act of previewing the treatment prior to commencing with it, a technician can greatly put at ease a client's mind and body. Many of the spa-goers we interviewed talked about how when experiencing a treatment for the first time or dealing with a new therapist or technician "not knowing what was gonna happen next" inhibited their ability to completely relax. In general, though spa-goers generally do not want excessive chit-chat during a treatment, they will value brief, strategically placed narrations about where they are in the treatment process—e.g., "Now I'm going to do X." As a rule, guess work should be eliminated from the client's experience. In general, when spa personnel miss opportunities to direct a goer's mind and body, the goer runs a risk of losing her emotional and psychological footing. This is especially true in the early phases of a treatment.

Getting Settled In

When asked at what point they begin to feel "comfortable" during their spa visits, the majority of the spa-goers with whom we spoke reported that they begin to feel "settled in" during the earliest stages of their treatments. This suggests not only that the early stages of a treatment are critical to the spa-goer's overall experience, but also that most spa-goers do not typically experience optimal comfort in the stages of their visit leading up to the treatment (e.g., checking-in, changing, waiting in the lounge, etc.).

Being Transported Out of Normal Consciousness

Though spa-goers enjoy tightly structured treatments, they typically do not want anyone mentioning the elapsing time of the treatment. In fact, Core and Mid-level goers expect that

tightly structured experiences will give them a deep sense of being transported away from their usual orientation to time (and space). When a treatment is finely structured, spa-goers happily find themselves slipping away from normal waking consciousness, getting lost in thoughts, becoming mindless, even drifting off to sleep. This sense of “being transported” is, in fact, one of the most alluring features of the spa experience for spa-goers at all levels, one that goes implicitly frame as a ritual effect of finely structured treatments and interactions.

The Awkwardness of the Vanishing Technician

Often, spa-goers experience suboptimal emotions whenever a therapist or technician leaves the treatment room during the treatment. If the technician must leave, for whatever reason, spa-goers will appreciate a clear explanation of the purpose of the exit and an accurate estimate of how long the therapist will be away. When this is not done, spa-goers easily—and often—feel as though the structure of their experience is giving way beneath their feet. They are apt to wonder about what is going on; they are apt to worry about the appropriateness of the technician’s behavior; they are apt to have concerns about having paid “good money” to be left alone.

The Awkwardness of the Treatment Ending

Ironically, the absence of a therapist is most profoundly experienced at the conclusion of a treatment, particularly if the therapist marks her exit from the room with an inviting but ambiguous phrase like, “Please take as much time as you would like.”

- In general terms, **Mid-level** and **Periphery** spa-goers appreciate the symbolism of being granted an opportunity to re-adjust, but they tend to “see through” the invitation. They have a gut feeling that someone else is scheduled for a treatment in the same room, so they feel pressured to “not take much time” to vacate the room.
- Though some **experienced Mid-level** and **Core** goers will take their time when invited to do so, even they worry about the potential embarrassment of falling asleep if lingering too long.

Exiting

Just as spa-goers expect their entrance experiences to be tightly structured, they expect their exit experiences to be well managed as well. In particular, the spa-goers we interviewed identified tipping as a particularly troubling element of the exit process. Most of the spa-goers we interviewed consider tipping a taken for granted element of spa-going. Most will even tip for mediocre or poor treatment experiences. Yet, we heard time and again from spa-goers about awkward, ambiguous, even non-existent tipping procedures at spas.

Tipping

Though the qualities of the tipping process do not “make or break” the overall quality of a goer’s visit, the goers we interviewed crave simple, discrete, ritualized procedures for tipping. As a rule, the less personal contact during the tipping process, the better. Specifically, spa-goers deeply appreciate it when tip envelopes are left in an obvious location available to them towards the end of their spa visit. They also appreciate the more personalized approach of thank-you cards and envelopes being left for them in unobtrusive locations; it helps too if the card is signed by each therapist who worked with the client. Such practices permit private, targeted tipping without the awkwardness of having to ask for the therapist’s name post-treatment. Procedures that make tipping awkward include requiring spa-goers to announce the tip amount during check-out, requiring tips be provided in cash, and having the therapist act as cashier.

Post-Visit

Just as a spa-goer’s search for structure precedes her physical visit to the spa, her spa experience often continues after she exits the spa as well.

Managing the Spa Experience Post-Visit

In the eyes of many spa-goers, spa personnel can gain credibility by providing advice on how to manage any lingering effects of their treatment as they re-integrate into their lives. Spa-going consumers experienced with massage, for example, may become suspicious if a massage therapist neglects to tell them to “drink a lot of water tonight to flush out toxins released during the massage” or to “avoid alcohol consumption for the next 24 hours.” In general, because the “spa experience” extends back into a spa-goer’s life, simple, professional advice on how to manage the experience beyond the spa is something most spa-goers, with the possible exception of inexperienced Periphery goers, will greatly appreciate, even expect.

The “Spa Day”

Further, many spa-goers, especially experienced ones, often plan their spa visits so that its effects will extend back into their lives for an extended period of time. Some spa-goers we interviewed, for example, will take a day off from work to prolong the sense of Escape or feelings of relaxation that a spa visit affords them. Very often, they will follow-up their spa visit with a relaxing day at home sipping tea and reading a good book, etc. Many spa-goers will appreciate suggestions and advice on the optimal way to manage the effects of the spa visit into the remainder of their “spa day.”

Post Visit Follow-Ups

For many spa-goers, just a few barely perceptible missteps in the structure of a given visit can significantly degrade the value of their experience at the spa. But there is more at stake here than the emotional state of the client. A few subtle missteps is sometimes enough to convince a spa-goer to “try” another spa next time. Core goers and assertive Mid-level goers might complain directly about suboptimal aspects of their experience but, as a rule, very few spa-goers will file complaints or constructive criticism directly with spas during their visit. *Typically, spa-goers will express discontent simply by not returning to the spa.*

Sometimes they do not directly voice discontent because they are uncomfortable with complaining. Sometimes they do not complain because they feel incompetent or unqualified to voice concerns about the “expert” spa experience. Other times, however, they simply need time to reflect on their experience and gain distance on its suboptimal features. They may have felt uncomfortable during their visit for reasons that were not entirely clear to them at the time, but which crystallize in their minds only upon further review. Still, even here, they are unlikely to voice discontent to the spa. *Spa-goer reticence about proactively filing grievances and complaints should not be confused with their unwillingness to do so.*

In fact, the spa-goers we interviewed unanimously applaud the idea of receiving post-treatment phone calls (particularly if the offer was made prior to their departure from the spa) from spa managers or owners to inquire about their experience and how it might have been improved. Our research suggests that this is not standard practice in the Spa World, a fact that might downwardly—and invisibly—constrain any given spa’s population of repeat customers.

The spa-goers we interviewed unanimously agree that an owner or manager should make this phone call. They would consider such a call from a therapist or technician awkward. Not only do they want to spare the technician’s/therapist’s feelings, they also worry about potential fall-out should they return to the spa in the future (e.g., developing a bad reputation). Lastly, they do not consider the reception staff appropriate for this task because they are perceived as powerless to make changes or improvements.

Important Dimensions of Ambiance

Spa-goers are extraordinarily sensitive to the internal environments of spas. Any disagreeable element of the internal atmosphere of the spa, even seemingly innocuous ones, can easily inhibit their ability to “let go” and relax. In fact, in a general sense, spa-going consumers evaluate the internal environment of spas in terms of whether they facilitate or inhibit the optimal subjective experiences they associate with The Spa World. Thus, because spa-goers generally frame spa-

visits as opportunities to “focus on themselves,” they count on certain dimensions of a spa’s internal environment to help them achieve certain kinds of self-consciousness and avoid others.

Sound

In general, spa-goers find their comfort levels reduced by sounds they deem inappropriate or extraneous to the spa environment. This is especially true during treatments, where mere spoken words from a therapist can disrupt a spa-goer’s experience. Indeed, spa-goers are so “noise sensitive” during their treatments that the presence of lyrics in music can seriously challenge their ability to achieve the “mindless” state of relaxation they so much desire.

In the context of a spa visit, any number of “out of place” sounds, such as a ticking clock, faint noises from car traffic, dim voices from another room, even the pitter pat of feet in the hallway, can undermine a main purpose of the spa-goer’s visit, namely, “to let the mind go” and relax. Certain noises, it seems, keep spa-goers overly attached to the very mental and emotional states from which they seek to distance themselves during spa visits.

TREND ALERT

Trend: Customization

Several spa-goers raved about the possibility of being able to select music for their treatments. Apparently, being able to select music gives consumers a sense of control over an important dimension of their experience. This suggests a broader point: *the more specific dimensions of a spa visit can be customized to individual spa-goers, the better.*

Lighting

Lighting plays a significant role in shaping a spa-goer’s experience of a spa visit. In general, spa-goers do not expect the quality of lighting to be uniform throughout the internal spa environment. Rather, they expect lighting to contribute to the distinctive mood of distinctive regions of the spa. For example, no spa-goer expects the light qualities of a spa’s reception area to mirror the light qualities of a treatment room. Indeed, spa-goers would find it odd, maybe even inappropriate, if a reception area was as dimly lit as a massage treatment room. At the same time, they strongly expect the lighting in massage treatment rooms and lounges to be dim, not dark. Most of the goers we interviewed find dim lighting a great aid to their ability to relax. What’s more, they also value dim lighting because it affords them a sense of privacy, renders a wide variety of visual stimuli imperceptible, and invites an inner focus on self and body.

In regions of spas that are dimly lit, spa-goers find that the strategic location of candles adds a cherished spiritual dimension to their experience. A burning candle is an active symbol of spirituality, peace, and tranquility in the context of a spa visit. As a result, it is important that flames of candles maintain their verticality as much as possible. Wildly flickering or “dancing”

flames, or flames on the verge of becoming extinguished, run a great risk of undermining a candle's value as a symbol of peace and tranquility, thus making them incongruent with the overall mood of a dimly lit space.

Warmth

Spa-goers think of warmth on two levels: the physical and the cultural. In terms of the former, though air temperature throughout the spa is an incredibly important aspect of the atmosphere, spa-goers consider it especially important that air temperature be "warm" whenever they are required to disrobe. Changing areas and treatments rooms should thus be carefully monitored to ensure that naked or partially naked clients will not become "cold" at any point in their experience. Similarly, spa-goers unanimously applaud heated treatment tables. As a rule, spa-goers strongly desire and expect the physical climate of a spa to be warm, especially when their naked bodies are exposed to open air.

Spa-goers also think of "warmth" on a cultural or symbolic level as well. Symbols of any kind that connote "warmth" stand out in the minds of many spa-goers as "nice touches." For example, many of the spa-goers with whom we spoke praised the presence of fireplaces in spas, even though they were not always sure that fireplaces were actually emitting heat of any kind. On the flip side, extinguished candles and unused fireplaces can work against a spa's efforts to create a sense of "warmth," as such things represent the absence of warmth or coldness.

Note on Lounges and Lounging

Unless they are visiting a spa as part of a group, spa-goers generally want to avoid the kind of self-consciousness that everyday social interactions routinely engender. In general, they shun experiences that flow from low level pressures associated with chit-chat with strangers. With this in mind, some of the spa-goers recounted awkward moments in lounges where furniture was arranged as if to encourage social interaction among clientele. In such moments, slight social pressures to engage with other people is apt to draw spa-goers away from the inward, self focus that inspired them to visit the spa in the first place.

Note on Spa Fitness and Ambiance

Fitness at spas is not a draw, nor is it a deterrent. Fitness is congruent with the Work driver, but seemingly incongruent with Indulgence and Escape. If fitness facilities are available, they must be discrete and physically separate from spa spaces so not to disturb the peaceful energy and ambiance. Yoga, Pilates, hiking and cardiovascular equipment are considered more appropriate in spas than weight training or high energy/impact aerobics. Spa-goers' orientation to spa fitness depends on their level of involvement in the Spa World.

Periphery:

- Spa-going is usually about Indulgence and Escape
- Do not connect spa-going and wellness
- Fitness is in direct conflict with desire to relax or pamper oneself

Mid-level:

- Spa-going is driven by Indulgence, Escape, and Work
- When seeking a spa experience for Work, fitness may be relevant
- When seeking Indulgence or Escape, fitness is irrelevant and potentially guilt inducing (i.e., I *should* be working out and not relaxing!)



Core:

- Spa-going is typically driven by Work
- Fitness is relevant to the extent that it will help meet their long-term holistic health and therapeutic goals

Spa-goers' perceptions of spa fitness also vary by spa type. Fitness is not a draw at the **day spa**, because it is usually accomplished at a local gym/fitness studio at which spa-goers are members. At **resort/hotel spas**, consumers expect fitness facilities to be provided by the hotel, but not necessarily attached to the spa. Fitness facilities would be utilized to the extent that fitness is so ingrained in the spa-goers lifestyle that they would want to maintain their routine while on vacation/business travel. Spa-goers expect fitness facilities at **destination spas** dedicated to holistic experiences (e.g., diet, exercise, spirituality, etc.). An array of fitness facilities would be attractive as spa-goers are trying new wellness experiences in these environments. Fitness is not associated with the nature of the Work accomplished in **medical spas** (e.g., cosmetic: dermabrasion, laser hair removal). For instance, some medical spa treatments are sought when diet and exercise are not working to achieve desired goals (e.g., contour wraps); therefore, fitness seems at odds with the purpose of these spas. Spa fitness is best implemented at destination spas, spas oriented to Work more than Escape or Indulgence, spas that cater to Core and Mid-level spa-goers, and spas designed with ambiance segregation capabilities (e.g., separate entrances and/or change rooms for spa-goers seeking fitness versus those seeking Indulgence).

Evolving Deeper into the World

Deepening Spa-goer Involvement in the Spa World

Encouraging Exploration

The majority of spa-goers with whom we spoke maintain an experimental approach to spa-going and are unlikely to give up on their philosophy of “seeing what else is out there.” Though some spa-goers do maintain loyal connections to specific spas and specific therapists/technicians, we believe not only that these spa-goers are in the minority but also that their loyalties are hardly ever monogamous. Further, we also believe that efforts to garner loyalty to specific spas contradict the preferred cultural approach to spa-going in North American societies, which is experimental and open to new, potentially better experiences. Thus, instead of attempting to change the current “nature” of spa-going consumers by turning them into loyalists, we believe that spas should collaboratively “exploit” the experimental and exploratory orientations most spa-goers bring with them to the Spa World by promoting loyalty to the spa industry, first and foremost. We recommend a points system.

- **Spa World Points System:**

Consumers should be allowed to earn “points” applicable to future spa services each time they spend money at a spa. For example, day spa clients would be able to earn points redeemable at future day spa visits or on trips to destination or resort/hotel spas. We suggest that earned points be redeemable at a network of participating spas.

TREND ALERT

Services to Explore

- Micro-dermabrasion is being considered by many, despite trepidations about pain, cost, and risks.
- Spa services for mom and baby (e.g., baby massage)
- Spa services for pre-adolescent kids (e.g., spa birthday parties)

Partnering with Spa-goers on Customization

The Point System ideas reflect a broader possibility of spas partnering with consumers on terms that resonate with consumer life conditions and desires. Along similar lines, many spa-goers also value opportunities to customize their spa visits as much as possible to their specific tastes and desires. For example, most of our spa-going study participants love the idea of being able to pre-select the music they will hear during a treatment. Many spa-goers would also appreciate possibilities of pre-selecting the scent of the treatment room and products used during the treatment. The general point is this: spa-goers value spas that partner with them to cultivate a customized experience.

Barriers to Deepening Spa-goer Involvement in the Spa-World

Value Attachments

In the Spa World, consumers tend to languish at their given level of involvement for extended periods of time (i.e., years). Concerns about value prevent spa-goers from experimenting with new treatments that would deepen their level of involvement in the World. Essentially, these consumers view spa-going as an indulgent means of escaping their daily lives and want to make the most of each experience. Good value is achieved when a spa-goer receives the intended benefits from the experience, whether it is tension release, smoother skin, cleaner pores, peace and quiet, etc. Poor value or a “rip off” occurs when the spa experience does not deliver the desired outcomes for that visit.

TREND ALERT

Massage

Massage will continue to grow and dominate spa experiences. It is likely that therapeutic massage will become more popular as awareness and knowledge increases.

New experiences are seen as risks: financially, physically, and emotionally. Financially, spa-goers do not want to spend their hard-earned dollars on an experience that leaves them feeling less satisfied than the spa experiences to which they have become accustomed. Physically, spa-goers want to see comparable changes in their skin or feel comparable effects in their bodies. Emotionally, spa-goers want to achieve the same mental state that brings them back to the Spa World again and again. New spa treatments, however tempting, are approached very cautiously because spa-goers want a “guaranteed spa experience” for their money. Spas are viewed as the only place where this unique experience can be achieved, and thus, expectations run high. Previously experienced treatments are viewed as a fail-safe guarantee of an enjoyable and valuable investment of time and money. Perhaps spas should consider a money-back guarantee for first-time experiences in order to encourage spa-goers to try, and habituate to, a wider array of services thereby promoting evolution deeper into the Spa World.

Nudity

Concerns about nudity also prevent spa-goers from deepening their involvement in the Spa World. Spa-going consumer concern about nudity is three-pronged. First, there is the issue of modesty or the need to be appropriately dressed given conservative societal norms and values. In North American society, there are but a couple of situations in which adults are permitted to be nude, namely sexual encounters and medical procedures. Second, body image concerns prevent spa-goers from disrobing. Both men and women do not wish to be seen nude because they fear judgment and embarrassment over not possessing our society’s ideal thin and toned body. The third concern about nudity pertains to sexuality. Spa-goers make strong associations between being nude and sexual situations. The spa environment does little to dispel sexual

cues. In fact, the environment reinforces sexual imagery with sensual elements including soft lights, soothing music, and pleasant scents.

Spa-goers at the Periphery and Mid-level stagnate in their evolution because of perceptions that nudity is often required for certain treatments (e.g., massage, body wraps, body scrubs). We spoke with spa-goers who had been contemplating body treatments, in some cases for years, before they mustered the courage to be nude in order to achieve the desired treatment benefits. These spa-goers experienced some relief once they realized that: 1) they did not need to be nude for the treatment, or 2) their modesty was preserved, no body image judgment occurred, and nothing of a sexual nature transpired. These spa-goers pondered why they had been waiting so long for these experiences, and expressed a keen interest in experimenting with other previously “taboo” treatments. The following excerpt captures this reaction:

Interviewer: *Did today’s experience change your orientation towards spas?*

Respondent: *The whole nudity and body image thing, it made me more comfortable.....that kind of fear is gone, that kind of intimidation is gone. I would not even have a second thought about having this treatment.*

Interviewer: *And how has today’s experience changed what other treatments you’re interested in?*

Respondent: *It’s changed it a lot. Now I feel like I want to delve into it...I want to see what the body scrub is about, I want to see what other services they have out there rather than just sticking to the massage, a manicure, pedicure, and a facial occasionally. I would want to see what those deeper treatments are about.*



Given this respondent’s outlook, it is obvious that encouraging deeper involvement in the Spa World requires spas to manage expectations surrounding nudity and privacy. In fact, the new “hot treatments on the horizon” tend to be those that consumers have previously avoided due to nudity concerns (e.g., body wraps, body scrubs).

It is a necessity that spas are upfront about how spas manage privacy and modesty. Detailed information about what clothing is appropriate for each treatment should accompany treatment descriptions. Descriptions of draping procedures must be articulated with enough detail to encourage spa-goers to experiment. Furthermore, photographs of the treatment in-process could be paired with descriptions so spa-goers have a visual representation of how nudity is managed during the treatment. Importantly, this basic information should not be reserved only to those consumers making a first time visit to the spa. This information should be provided to every consumer considering a new treatment.

A Note on Therapists' Sex and Sexual Orientation



Because some consumers fear sexual overtones during their spa visit, the gender of the therapist is an important consideration in booking massage and other body treatments. Female consumers tend to want female therapists for massage and body treatments, and male consumers do not have a strong preference. However, both male and female consumers perceive male massage therapists as having a stronger touch, but female therapists as being more attuned to bodily/muscular needs. It seems that the "heterosexual assumption" is at play when consumers have a preference for the sex of their therapist. Never did the therapist's sexual orientation arise as a consideration even though consumers' sex preference is clearly an attempt to avoid a potentially sexual situation.

Spa Type Labels

Medical Spas occupy a central space within a restricted subculture of the spa-going community. To broaden the appeal of Medical Spas beyond this subculture, we believe the label "Medical Spa" should be altered in such a way as to pique the interest of consumers currently turned off by medical associations and to maintain the loyalty and interest of those currently drawn to Medical spas.

On a related note, though the distinction is clear to Core goers and industry professionals, our research suggests that many spa-going consumers, and their non spa-going counterparts, do not make clear distinctions between Destination Spas and Resort/hotel Spas. In fact, in the minds of most of the people with whom we spoke, Destination Spas and Resort/hotel Spas are one and the same. As a result, the distinctive character of each spa type is apt to be lost on many consumers when these labels are used in marketing materials. Perhaps spa type labels should be revised according to consumers' understanding of spa differences so they are useful and meaningful to the consumer. Consumer derived labels will better enable consumers to target different spa types based on their needs and changing orientations to the Spa World, hence, encouraging a deeper evolution into the World.

Managing Discontent

As previously stated, for a variety of reasons (e.g., lack of assertiveness, feeling unqualified to make judgments, embarrassment, preference to put energies elsewhere, etc.) consumers do not provide negative feedback about their spa experiences. They want to have better experiences, but have minimal expectations of amelioration based on their feedback. This is an important point to consider because of the strong spa-goer tendency to voice discontent simply by not returning to a spa. This tendency has implications for the consumer's evolution in the Spa World. It is likely the consumer will stay at the same level of involvement as they spa-hop booking the same type of service in search of a satisfying experience. The spa-going consumer could also regress in their involvement if the dissatisfying experience occurred during an experience that is typical of deeper levels of evolution (e.g., Thai massage). Consequently, without corrective action, spa-goers can prolong their time at a given level (e.g., Periphery). The spa-goers with whom we spoke unanimously applaud the idea of receiving post-treatment phone calls from spa managers or owners to inquire about their most recent spa visit and how it might have been improved. It is essential that a person "in power" receive the feedback for consumers believe that action will be taken.

Key Findings

- Spa-goers on all levels strongly expect that their entire spa visit will be tightly structured
- Spa-goers regularly experience feelings of uneasiness during transitional points in their visits
- Spa-goers typically feel most "settled in" to a spa visit during the early stages of their treatments
- Being "transported" out of normal waking consciousness is a key marker of a quality spa visit.
- Treatments often end on awkward notes due to ambiguous language of therapists/technicians
- Spa-goers take "tipping" for granted but spas very often mismanage the tipping process
- Spa-goers typically express discontent by simply not returning to the spa
- Spa-goers appreciate post-visit phone calls inquiring about their experience and how it might be improved in the future
- Mid-level and Core spa-goers value opportunities to customize their spa visits as much as possible to their specific tastes and desires

- Spa-goers tend to languish at their given level of involvement for extended periods of time due to moral and social values preventing them from experimenting with new treatments
- Concerns about nudity also prevent spa-goers from deepening their involvement in the Spa World

Recommendations

- Support spa exploration with spa alliances that provide consumers with loyalty incentives
- Empower consumers by creating opportunities for them to customize their spa experience with scent, sound, etc.
- Overcome value-attachments by providing monetary incentives each time a consumer tries a new experience
- Negate nudity concerns with accurate and visual descriptions of body draping and screening techniques
- Consider revising spa type labels to reflect consumers' (rather than the industry's) understanding of spa differences to enable them to target specific spa types to meet their evolving needs
- Proactively manage discontent by reaching out to clients and inquiring about dissatisfying experiences

Spa Products



Spa-Goer Perceptions of the Role of Products in the Spa Experience

As part of ISPA's research objectives, we investigated the role of products and traditional product-centered retail experiences among all our respondents. The goal of this research was to find optimal consumer-centric ways for introducing and selling products to spa-goers given their use of a wide variety of retail channels to obtain body care and skin care products.

Products Not Top of Mind While At the Spa

Spa-goers are primarily seeking an “experience,” as opposed to a product, when they venture into the Spa World. This is true regardless of whether their motivation is Indulgence, Escape, or to have Work performed on their face or body. Purchasing spa products is just not a top of mind issue at any stage of the spa experience. Spa-goers vary in their openness to purchasing products while at a spa, but they are united in their preference for the manner in which they hear about spa products (more details to be found later in this chapter). Interestingly enough, a spa-goer's level of involvement (Periphery, Mid-level, or Core) in the Spa World does not greatly affect their perceptions of either the relative importance of products for sale within the spa experience or the manner in which they should be introduced to spa-goers.

Unmet Need for Customized Skin Care

Spas Have Poor Reputation as Knowledge Centers

Spa-goers associate “spa” with excellent “skin care services” more than with product knowledge. When compared to the highly conversational interactions transpiring every day inside high end body care boutiques and at department store cosmetic counters, spas do not appeal to many spa-goers as first-turn options of knowledgeable, customized product recommendations.

Spa-goers need a Skin Care Knowledge Liaison

Beyond the spa walls, so to speak, spa-goers are literally awash in marketing, spin and trendy buzz about this or that skin care solution. Despite this swirl of knowledge, otherwise intelligent spa-goers often recounted stories to us of poorly made skin care purchases. Many even pointed to piles of unfinished and rejected products that have soured their mood on skin care purchasing or at least created lasting regret and frustration. It is clear from consumers’ stories that there is a need for *customized* information from the world of skin care experts to spa-going consumers of skin care products.



In part, this is because there are few retail channels that have successfully combined 1) knowledgeable skin care experts with 2) intimate access to consumers’ skin and 3) the time to make an in-depth individually tailored solution. For instance, most retail channels incorporate some, but not all, of these three factors:

TREND ALERT

Drug Stores as Competition

Spa-goers find that high quality body care products and consultations are increasingly available in channels believed to be more convenient such as drug stores.

- **Department Stores** (e.g., Macy’s) generally do not have credibility as skin care experts or a reputation for truly tailoring solutions to consumers’ needs, given the assumption of commission-oriented sales
- **Body care boutiques** (e.g., Aveda, The Body Shop, Origins) are seen as too frivolous or indulgence oriented and do not gain intimate access to consumers’ skin in the same

way as a facial technician does; their staff are not seen as the “skin care” experts at the level of facial technicians

- **Drugstores** (e.g., Walgreens) offer some high quality products and knowledge transfer about the products but does not have the time to learn/examine a spa-goer’s skin and can not match the intrinsic authenticity of a facial technician

More spas can capitalize on product sales because they are in a unique position to accomplish all three factors under one roof.

Traditional Retail Sales Approaches Can Easily Disrupt the Spa Experience

Although spa-goers recognize that spas are for-profit businesses and that product sales are a significant revenue source, *they do not want to be made aware of this business reality and its related business moods/motivations while they are in the spa.* Spa-goers do not see spas as product-centered retail environments in the same way that they view high end body care boutiques. Spas are simply not “stores” in the minds of spa-goers. Instead, they are the pinnacle of service-oriented retail, where service has all but eclipsed products as the focus of their attention and desires. Overt or hard-sell product approaches are therefore quite off-putting, even offensive, to most spa-goers. Traditional retail sales and marketing tactics threaten the sacred quality of the service environment expected at spas.

Spas are a retail environment in which spa-goers expect to find:

- A sanctuary in which their needs are paramount
- A place where staff treat them in the most ingratiating, comfortable, friendly and supportive manner possible
- An Escape from the pressures of everyday life, including the negative pressures emanating from aggressive business practices
- A safe place where a spa-goer can let his or her guard down and truly relax

Spa-goers we interviewed represented a very black and white view of their experiences with product sales efforts at spas. It takes very little for spa-goers to have their entire spa experience be tainted by the intrusion of traditional retail product sales tactics. Given how easily the spa experience is threatened by any hint of “product pushing,” we believe managing the risk of this perception is absolutely critical to effective product distribution in spas.

Negative Experiences with Product Sales at Spas

Spa-goers indicated that any unsolicited discussions of products before, during, or after treatments are construed as a “hard sell.” Hard sell pushes not only lead to questions about the appropriateness of the specific products for the individual spa-goer, but they also violate their sense of immunity from everyday commercialism. Furthermore, they create strong distrust of a spa’s authenticity and of its personnel’s commitment to spa-going. The universal question raised by this behavior is, “Are these people here to meet a quota or simply offer me the best treatment experience I’ve ever had?”

Examples of hard sell tactics that spa-goers don’t react well to while in spas include:

- Systematic disbursal of coupons, product brochures (i.e. someone standing around handing them out to every passerby)
- Discussion of product purchasing opportunities by front desk personnel (not assumed to be as knowledgeable as therapists or technicians)
- Pre-packaged product sets presented for sale at the exit stage because spa-goers do not see these product sets as customized to their individual needs
- Treatment rooms where products dominate the décor of the room

Positive Experiences with Product Sales at Spas

Sales as Empathic Offering of Customized Knowledge/Solutions

Not many spa-goers could relate positive experiences with product sales, but those that did focused on experiences where a customized solution was developed based on careful listening to spa-goer’s specific needs. The most successful sales efforts are those that provide solutions grounded in paying attention to individual spa-goer’s needs. Intimate and personalized knowledge is perhaps the most distinctive thing a spa can add to a product that many other retailers simply can not.

After-Care Forms

These forms are most commonly used in facial care services. Most usually employ diagrams to chart out what skin regions should be addressed by individual products. The best have an image of the body/face that is large enough for therapists to illustrate where each recommended product is to be applied, how it is to be applied and *why* it needs to be applied (see section, *Mastering the Art of the Spa Sell*, later in this chapter for a more detailed discussion).

After-Care Form Risks:



An ineffective after-care form is one which lists all available products for the therapist to select by circling/highlighting (this does not look personalized). In addition, if these forms get written, handed over and *go undiscussed*, Spa-goers will not assume that products listed are *truly* tailored to their own needs. This common practice in facial services leaves an impersonal feeling to what should be a productive experience in customization.

Personalized Product Baskets at Check-Out

This tactic involves a small, customized product basket containing no more than a few products. The products in it are ideally only those mentioned in prior discussions with the client and they are assembled by the therapist, not the receptionist or other staff person. It is essential that the client be informed that the basket will be waiting for her at check-out and that it is solely for her convenience and information - no purchase is expected (see section, *Mastering the Art of the Spa Sell*, later in this chapter for a more detailed discussion).

A Consumer-Centric View of How to Sell Products During the Spa Experience

The manner in which the topic of “products” arises within the spa experience is absolutely critical to managing the risk of “hard sell” perceptions. This is a complex sales process requiring astute therapists and technicians well trained in empathic listening skills and indirect sales tactics. Our research with spa-goers has revealed that, mastering the art of selling products requires attention to the following key components:

- At what stage in the spa experience should products be discussed
- Who should be discussing products
- How the subject of products should get broached by spa personnel
- What products should get discussed

Failure to master any of these can trigger a “hard sell” perception in the sensitive, easily offended, minds of the average spa-goer.

At What Stage in the Spa Experience Should Products Be Discussed?

Preferred Stage: After Treatment

Spa-going consumers expect and prefer that product discussions will occur only *after their treatment*, if they occur at all. The transitions that routinely take place after the spa-goer leaves the treatment room are most appropriate for product discussions:



- Transitional escorts from the treatment room to the changing room
- Transitional escorts from the changing room to check-out

Second Best Stage: During Treatments

If products are mentioned as a result of the natural flow of conversation during treatment, that is acceptable as well, but may be less preferred by those seeking Escape as a top priority. This is because product talk will simply extend conversation and disrupt the ability to withdraw as much as possible from social interaction.

It is important to note that hard sell approaches and sales-centric phrases should never be used in the treatment room.

Dual Role Risks



Spa-goers perceive therapists and technicians as caregivers, a role incompatible with the role of salesperson. Skillful execution of this dual role will likely require training beyond that of a therapist's or technician's professional or technical preparation or that of a weekend sales workshop. Customized training programs, whether led by spas or by manufacturers allied with a spa, are warranted.

Who Should be Discussing Products?

Spa-goers expect that whoever talks to them about products within the spa environment is both knowledgeable and experienced in the use of products they are talking about. Ideally, they will also have observed their effects on clients and/or themselves. Consumers of body care products, especially, find great value in recommendations based on the recommender's personal experience (but particularly if their skin/age aligns closely with that of the consumer they are talking to).

Most Preferred Source: Therapist Working With Me Today

Spa-goers see the therapist/technician who is providing their current service/treatment that day as the most appropriate source to inform them about product qualities and to make product recommendations. This is because they feel that at least this staff person knows some details about them, their body and their skin to warrant making an intelligent customized recommendation.

Less Preferred Source: Therapist Not Working With Me Today

Other therapists or technicians may suffice as knowledgeable experts; however, the opportunity to establish rapport and communicate understanding rests with the therapist or technician with whom the consumer has been interacting most recently. Part of the problem here lies in the fact that most spa-goers, even frequent ones, do not request the same technicians/therapists across visits to the same spa nor do they seek to establish long term service relationships as they do in hair salons. This means that they do not readily assume that a technician they had once before at a given spa would remember, in detail, their skin issues.

Least Preferred Source: Front Lobby Staff

Spa-goers do not perceive receptionists or hostesses as particularly knowledgeable about spa-going or spa products. They may assume that these roles are merely “front desk” jobs recruited on the basis of customer service skills, not knowledge or training. All too often, though, spa-goers find that these are the only spa personnel willing and available to have product discussions when they are browsing product after check-out or after they get escorted to check-out.

Acting as “Informant” for Spa-Goers Builds Trust



Ironically, a therapist’s ability to sell spa products to consumers is enhanced through referrals to cheaper products available elsewhere. This type of interaction builds trust and increases openness to subsequent spa product recommendations by powerfully signaling that the therapist has the Spa-goer’s pragmatic interests at heart rather than the spa’s sales agenda.

How Should the Subject of Products Be Broached?

Who Should Bring Up the Topic

From the spa-goer’s perspective, discussions about spa products can be broached either by them or by the therapist/technician. This is a less critical issue for them than experiencing abrupt or otherwise poorly timed “product talk.”

Consumer Driven Timing

Spa-goers we interviewed tend to believe that unsolicited product talk is taboo within the treatment room environment, especially, and generally anywhere within the spa environment. We infer from this, that product talk should only arise *in direct response to a concern or an issue raised by the spa-goer*, even if it is only somewhat tangential. Unsolicited comments, random product suggestions or discussions about products that do not relate to anything the spa-

goer has said, or that the therapist is currently using in the course of treatment, are irritating and abruptly return the spa-goer to the hectic world of commerce and everyday life.

Caregiving Tone

Spa-goers informed us that they respond well to naturally occurring product discussions that are tailored to their individual needs/concerns and orient to empathic caregiving. Spa-goers generally desire themselves, not the product, to be both the subject and the object of the conversation. So, spa-goers desire a caregiving tone when their needs or concerns (subject) are the impetus for mentioning a product and when realizing their goals or objectives (object) appears to be the therapist/technician's only concern. We have found that when the product is merely a necessary vehicle for addressing the consumer's needs and achieving their goals, therapists/technicians come off as caregivers and not product pushers. Phrases such as "for your convenience..." and "for your information..." aid in achieving this tone.

Risk of Unsolicited Recommendation by Brand



Spa-goers are especially sensitive to even the faintest hint of brand recommendations based solely on a spa's alliance with a manufacturer. These alliances are well known and assumed by many spa-goers just as they are in hair salons. Since body care consumers in general develop loyalty to brands only after sustained use and success, hearing about a new "brand" adds little persuasive power to a product pitch. Spa brands often tend to be quite obscure and not likely to have filtered their way to the Spa-goer prior to it being mentioned within the spa. Moreover, pointed "brand talk", centered on praising a brand or a product line in a general sense, is a classic sign to consumers that they are "being sold to" and "not listened to."

What Products to Discuss?

Most spa-goers prefer very little conversation during the bulk of their spa visit, especially when compared to a boutique body care retail outlet (the most directly comparable retail venue to a spa in terms of overall quality, variety and the average price point of available products). It naturally follows from this insight that, when the right time comes to talk product, that only a few products ever be discussed.

Our work with spa-goers indicates that products to discuss are those: 1) *they* inquire about directly and/or 2) that specifically address their stated or strongly implied needs or goals (as revealed during conversation with their therapist/technician). Products that are routinely used during the treatment (e.g. oils during a massage) can be introduced for the consumer's information and comfort, but should not be discussed at length unless either of the above conditions has been met. Products that are not part of the ongoing treatment should never be mentioned unless the circumstances meet either of the two conditions above. Furthermore, our

research indicates that routinely mentioning that treatment-related products are “available for purchase” appears to spa-goers as an impersonal tactic oriented more to the spa’s bottom line than to the spa-goer’s individual needs.

Recommendations: Mastering the Art of the Spa Sell

The Art of Conversation that Sells Without “Selling”

In the spa environment, effective sales will require mastery of indirect, *consumer-led*, sales tactics that forefront caregiving and background any sales agendas/quotas. A spa culture whose main priority is quota attainment, either from spa management or to keep an alliance going with a manufacturer, will subvert the cultivation of this art and ultimately hurt the reputation of both the brands in question and more likely the spa in question. Viewing clients as vehicles to quota attainment encourages hard sell conversations as employee practice. This kind of culture is at odds with spa-goers’ expectations of their spa experience as primarily about services, and secondarily about spa products.

The key here is something most therapists/technicians are already quite good at: effective listening. By listening carefully, talented therapists/technicians should be able to discover sales opportunities on the fly.

To accomplish this consumer-led sales approach, therapists and technicians must be able to:

- Carefully attend to “what” (content) spa-goers are saying and “how” (emotions) they are saying it (see Appendix III for examples)
- Reflect that understanding back to consumers
- Offer individual spa-goers solutions targeted to their needs/concerns

This consumer-led approach may not allow for consistent, highly predictable sales inside the spa environment but will allow spa-goers to experiment with new brands and become loyal to them in the most authentic manner possible.

The authenticity generated by this kind of indirect, customized sales tactic derives from the fact that products get presented to spa-goers as caregiving gifts and, in turn, get narrated by them to friends as “discoveries.” This kind of positive buzz is critical when building loyalty to often quite expensive products, especially product lines in product categories wherein spa-goers routinely look for value options across multiple channels, including spas.

Transferring Product Knowledge/Solutions

The most useful way to build on a conversation that veers towards product talk occurs post-treatment with a gift of knowledge/tailored solutions that demonstrate that someone was actually listening to the spa-goer. There are two emerging tactics here that spa-goers orient positively to: 1) the customized after-care form and the 2) personalized product basket.

- The *after-care form* indicates which products were discussed, their purpose and benefits. Sometimes these sheets have an image of the face or body on which the therapist/technician can illustrate the targeted zones for product application. This tool offers the advantage of illustrating customization and it returns home with the spa-goer as an enduring record of the recommendations, if he or she chooses to postpone product purchase. *Right now, we found that these sheets seem to be more commonly employed after facials, but could easily be adapted for use with any treatment or service.* The potential of the after care sheet from a consumer perspective is its functionality as a handy reminder. Spa-goers may not want to purchase a recommended product immediately for financial reasons or because they want to use up their current product first and will appreciate the ability to carry product knowledge with them for the moment when they are ready to buy.
- A *personalized product basket* can be assembled by the technician/therapist for each spa-goer after the treatment, *but before he or she leaves to pay.* The collection of products in this kind of basket should be limited to a few items, and must be restricted to those addressing stated or easily inferred consumer needs. A hand-written note would add a personalized touch, however brief it may need to be given the time constraints of producing a basket on the fly before the next client shows up. During the post-treatment transition, the therapist/technician should introduce the basket as something “for the spa-goer’s convenience,” explain its contents, indicate that the basket will be waiting for them when they check-out and reinforce that there is absolutely no expectation of purchase.

Multi-Channel Strategy: Establishing Spas as Brand/Product Learning Centers to Generate Sales Online

Part of the risk of selling any product in a spa is that the spa might develop a reputation for being more interested in retailing than its core reason for being: service-centered caregiving. This is a difficult spa-goer perception to manage. Essentially, spas have the unenviable task of managing their relationships with product manufacturers without alienating spa-goers. Given that this is a marked concern for spa-goers, we recommend seriously considering multi-channel sales strategies that leverage the rapid growth of manufacturer direct online channels as a venue for value-oriented purchasing of otherwise expensive, high margin products for routine use.

Traditionally, the web has been used as a point of presence to generate in-store sales among traditional brick and mortar retailers. Flipping this principle on its head, our research suggests strong potential for turning spas into dynamic points of presence that generate online sales direct from well designed manufacturer websites.

The value here, for both manufacturers and spas, is that it allows manufacturers the space (the website) to thoroughly promote their products in any way they see fit without the risk of sabotaging the guided experience of spa-goers inside the spa environment. This strategy aids spas by encouraging them to focus on their core purpose, which is offering highly refined service experiences, and less on stocking, merchandising and moving products. The latter is a serious distraction for some spas, and spa-goers can detect this disproportionate interest in products very quickly. Instead, manufacturers could incentivize spas to become discovery zones for elite spa brands where they envelop brands/products in authentic skin care knowledge spa-goers crave and that manufacturers have a hard time communicating themselves.

Leveraging the After Care Form

After care forms are an ingenious vehicle through which therapists/technicians can become brand/product evangelists without overstating the brand's agenda, something spa-goers don't generally concern themselves with much when compared to the efficacy and value of specific products. There is a variety of ways in which to think about this vehicle to create a point of presence for spa products:

- **List product names for purchase at check-out:** This allows spa-goers, very simply, to locate spa products quickly in the lobby, if they would like to experiment.
- **List web addresses for manufacturer sites:** After-care forms can be used to drive spa-goers to manufacturer leveraged value-driven web sales for their products, if therapists/technicians carefully inscribe names spa-goers can Google or Froogle quickly at home. This is a powerful empathic technique, since so many spa-goers appear to use online vendors as a way to obtain something they like for a value price point.
- **List the name of a product to sample at check-out:** If a system is designed to quickly access product samples at check-out, the spa-goer can simply show their after care form to a front desk person to obtain a free sample *minus a product pitch*.

TREND ALERT

Internet Shopping

Some internet savvy consumers purchase spa products online. The reported benefit is substantially lower prices (e.g., 25% less). The downside of purchasing spa products online is it is difficult to know which "new" products to purchase as there is no sensory product experience. Furthermore, for international consumers purchasing U.S. products, there are hassles and expenses associated with international shipping, taxes, and duty.

Spa-Goer Reactions to Product-Focused Retail Design

As we mentioned at the beginning of this chapter, spa-goers do not view spas as “stores” and do not prefer to enter into spas awash in shelving and SKUs, if they can avoid doing so.

Consequently, a detailed discussion of spa product merchandizing is beyond the scope of this chapter. However, detailed information about spa product merchandizing is available in the following chapter. When spa-goers notice products at spas they communicate that an understated, highly select display of products will work best.

Location of Products Within the Spa

Lobby is Ideal

Product displays are most commonly found in spa lobbies. And this is where spa-goers tend to expect them as well. Our research suggests that lobbies are the most effective location for spa products since most spa-goers who are leaving have access to them when they are paying (i.e., have their purse/wallet out and ready). Furthermore, individuals who are merely entering the spa to make inquiries or meet a spa guest get exposed to the product displays too. And the lobby is one area where some semblance of a retail environment does not violate the mood of the visit, within reason.

Avoid Behind the Counter/Exit Shelving

Shelving behind check-out counters or near exits places browsing spa-goers in the same space as entering/exiting patrons, creating congestion and limiting likely browsing time. Displays located too closely to the exit are also often overlooked or noticed only when the spa-goer is fully committed to leaving. Exit locations present missed opportunities, as many spa-goers will not usually expend the effort to return to the check-out with a product purchase once they have already checked-out and paid for their services.

Waiting Lounges Are OK, but Risky

This is an environment where spa-goers are soaking up the ambiance of the spa and transitioning into their spa experience. Minus pricing information, artful mention that certain elements in the lounge are available for purchase (e.g., candles, tea, etc.) is acceptable but should be understated. By no means do spa-goers want to see product shelving or at-shelf displays inside these spaces.

Hiding the Skin Care Magic, Revealing it to the Select Few (or Many)

Some spas have adopted the bold move of escorting would-be buyers of skin care products away from the lobby and into a “secret” or concealed space where “special” products are stored. This sales approach has many advantages. For instance, it helps to maintain the sense that the

lobby itself exudes a hard-line focus on offering amazing treatment experiences and spa journeys, rather than sales. When spa-goers are escorted to a concealed product store or product shelving space, they do not need to look around in bewilderment for tough to find products. More importantly, this tact can lead spa-goers to believe that they have been granted privileged access to the spa's internal skin care secrets. If managed creatively, this approach may also convince spa-goers that their privileged access to a secret space reflects their privileged status in the spa context. This is a tactic traditional retailers are unlikely ever to use, because it diminishes the possibility that browsing will evolve into impulse purchases.

Navigating Products

Spa-goers do not want to expend much effort when shopping at a spa, especially in an environment that is oriented so heavily to Indulgence and Escape. Often, they are purchasing on the way out of the door from a much more meaningful experience than the shopping they are now engaged in.

Minimize Barriers: Offer Product Recycling and Open Return Policies



The consequence of spa-goers constant search for the best facial skin care solutions is an often embarrassing stockpile of partially used products. Guilt over these stockpiles can act as barriers to additional purchase, because consumers feel obligated to use what they have on hand (even though they eventually end up throwing the products away). The stockpiles also serve as physical reminders of “wasted money” and the desire to avoid additional bad purchases. Establishments that accept the return of partially used products, recycle these products or provide future purchase discounts for returned products may help overcome these emotional purchase barriers associated with frugality and guilt over consumer wastefulness.

Clarity and Simplicity

- **Clear Pricing:** Prices for all items should be obvious. There should be no doubt in a spa-goer's mind which products are for sale and which are for use while in-spa only.
- **Simple Product Displays:** Visible product displays should be simple. While spa-goers appreciate choice and variety, an overwhelming number of selections only serves to confuse and contributes to indecision. Presenting multiple brands per shelf is not as attractive as a single-brand display. Within each product category, there should be no more than a handful of selections. Display shelves should be full to avoid looking “picked over,” but they should not be crowded either merely to save staff the convenience of frequently replenishing. An overstocked shelf resembles a stock room, not a welcoming display. Finally, product displays should be well labeled (e.g., facial

care, body care, lifestyle), especially in larger retail spaces, to reduce confusion and complexity.

- **Guided Selection for the Hunter:** Ultimately, the best way to help spa-goers navigate retail displays at spas is to discriminate between the “browser” and the “hunter.” Any spa-goer purchasing a product recommended to them during the spa experience is a “hunter” and should either have the product pulled for them before they arrive at check-out or be led directly to it by spa staff to increase the efficiency and simplicity of the shopping experience and the overall exit experience.

Using Gendered or Gender Neutral Displays (but not solely feminine ones)

Products exclusively for men should be displayed distinct from products for women. The display should be presented in such a way that is identifiably male and inviting to men. For instance, products nestled among “frilly” fabrics and flowers do not help men recognize the products as relevant to themselves. A simple gender neutral display rack will suffice. The same principle applies to products that are intended to be unisex.

TREND ALERT

Gender Specific Products

Male skin care products are a significant trend; in particular, traditional shaving products. The traditional barber shop shave combined with a “facial-by-another-name” may be an important gateway experience encouraging more men to enter the Spa World. Providing products that are exclusively for men is necessary to address the needs of the growing number of male Spa-goers.

Creating Dynamic Product Experiences in Retail Spaces

Spa-goers, as experienced consumers of high end body care, appreciate more interactive retailing than they can get at the usual mass body care channel (e.g., drugstores, grocery stores, supercenters). Retailing experiences that allow spa-goers to feel as if they are truly learning as well as carefully experimenting will not only drive product sales but also build loyalty to a spa.

Take Home Samples

The most critical marketing tool available to spas today is the take home product sample; it is essential for any product designed for the face or hands, since these are “on-stage regions” of the body (i.e., spaces of the body that are in public view and rarely covered with clothing). Products used that day during a treatment will not reveal potential side effects in spa-goers’ minds for several more days. Therefore, mere use during treatment cannot count as a sampling experience for most spa-goers.

Gifting Samples as a Capstone Experience

During the all important transition to check-out, a therapist could provide a tailored product sample taken directly from product shelving as a powerful gift that drives future product sales and faith in the spa as a product purveyor with the spa-goer's needs in mind. If the spa already conducts follow-up telephone calls with spa-goers a day or two later (to get honest feedback on the treatment experience), the caller could also inquire at this moment about the efficacy of the sample product extending the mood of caregiving and customization well beyond the spa visit itself.

Scheduled, Invitation Only, Product Demonstrations

One way to remedy the unmet need for knowledge transfer about skin care solutions is for spas to stage product demonstrations by invitation only. Held as semi-exclusive events, spas could host a select group of spa-goers for a product demonstration conducted by spa personnel. The correct application of spa products is demonstrated on a model and consumers are instructed in application techniques. Spa-goers receive product education in the process and are given opportunities to practice the application techniques learned. Product discounts can be offered for those who attend the event as an added incentive to make product purchases. We do not recommend having brand representatives or product salespeople conduct these sessions, since they will not come off as authentic, credible caregivers for spa-goers in the audience. Spa-goers would rather gain knowledge from their therapists not companies whose motives in transferring knowledge are mixed, at best, from a spa-goer's perspective.

Key Findings

- Products are not top of mind for spa-goers, but services are
- Traditional retail sales and marketing tactics threaten the sacred quality of the service environment expected at spas
- Spa-goers crave customized skin care knowledge tied to concrete solutions
- Consumers perceive spas as poor places for learning about skin care, despite industry attempts to the contrary. The problem is in executing the knowledge transfer in a way that seems consumer-centric rather than sales-centric
- Spa products are best sold:
 - After treatments, which are transitional moments where conversation is feasible and appropriate between the spa-goer and therapist/technician
 - Through therapists/technicians they are interacting with during each visit
 - Through consumer-led sales tactics drawing on the art of listening
 - When combined with empowering, individually tailored information from therapists

- Spa-goers expect to find products in the lobby areas but do not want these retail spaces to be cluttered or extensive

Recommendations

- Utilize effective listening to frame product sales as an informative and caring gesture that is oriented to the consumer's needs
- Reinforce product discussions with after-care sheets or customized product baskets
- Best categories to sell:
 - Products that extend the functional “work” of a spa's most distinct gateway services (e.g. facial skin care products, manicure/pedicure products; spa-quality tools for application of these product) for the home
 - Products to re-create the spa ambiance at home to extend the feeling of “Escape”
 - Products with indigenous active ingredients that promise enhanced efficacy
- Clearly label products with prices
- Create product displays that are simple and uncluttered, but not sparse
- Locate products in spa lobbies in easily accessible areas that encourage lingering (i.e., away from the checkout and door)
- Provide opportunities for consumers to interact with the products (e.g., at-shelf testers, take home samples, product demonstration sessions)
- Implement money back guarantees/spa product recycling programs to overcome the emotional barrier of unused product stockpiles

Merchandising at the Spa: WHAT SPA-GOERS WANT TO BUY AT SPAS AND HOW



Our research indicates that, within the larger world of body care, consumers are primarily oriented to skin care products when at the spa. As we shall indicate, though, there are other categories, including spa tools (e.g., facial brushes, etc.) and building blocks of spa ambiance (e.g., candles, aroma sticks, fragrances, etc.) that spas can productively sell to spa-goers, which might not have occurred to them upon entry into the Spa World.

Key Finding



Spas will create greatest distinction in spa-goers' eyes by merchandising products according to the drivers that Mid-level and Core spa-goers find most distinctly beneficial and that also extend naturally into the home environment. These are the Work and Escape drivers. Indulgence is not a driver we see as one that spa-goers will purchase for themselves via products to use at home. This is in part because spa Indulgence is inextricably linked with symbols of pampering that necessitate a retail service environment. Who is available at home to "pamper" the indulgence-oriented spa-goer?



General Principles Behind Skin Care Purchasing

Typical Decision Tree

Understanding the effect of different skin care merchandising strategies on spa-goers requires a good understanding of how they think about the skin care purchase decision. The following is a typical decision tree of how the spa-goer may be thinking about skin care while at the spa:

1. What is the **problem/function** I'm trying to address?
2. What **product** can the spa offer to address it?
3. Can I **sample** it first, to see if it works with my skin?
 - a. If it doesn't cause a skin problem, I *might* buy it
 - b. If it also does what I need it to, I *probably* will buy it
 - c. If it does what I need it to better than prior products, I'll definitely buy it
 - i. If it is a high replenishment product, I'll immediately begin looking for a value-oriented channel
 - ii. In the absence of a value-oriented channel, I may buy it at this spa regardless of price
4. If there is no sample, is it a decent **price** so the experiment won't become a waste?
5. Is there a **guarantee** of some kind, if I do develop a skin reaction?

Key Learnings about Skin Care Purchasing

- Sampling is key to driving product switching/experimentation in skin care, which is the category spas generally play in most logically in spa-goers' eyes. The more the skin care product is designed for "on-stage" regions of the body (e.g. face and hands), the less likely spa-goers will be to experiment/switch without sampling first.
- If 4 and 5 are true, purchase is possible same day, however a sale is much more likely when the product's benefits are touted via personal recommendation from the spa-goer's therapist that day or from a friend in their social network.
- The more the product is to be replenished frequently, the more likely a value-oriented channel will compete with the spa and the particular brands for sale there in the category.

Weak Product Categories for Spas

These are categories where spas do not compete well with other, well established retailers.

Product categories that focus on any of the following tend not to be great for spa merchandising:

- Everyday skin care for "off-stage" body regions (regions generally covered by clothing)
- Hair care

Everyday Skin Care

- Moisturizers
- Skin cleansers
- Body washes/gels
- Exfoliants

This large category of skin care products are a weak area of opportunity for spas, because the category is saturated with products across dozens of channels (from discount to über-luxury). Generally, spa-goers tend to be like other consumers in this category in that their high use rates orient them to value options quite often. Furthermore, consumers report having convenient access to a wide variety of reasonably priced “spa quality” everyday skin care products even at value-oriented channels such as drug-store.

These are categories where consumers do trade up but generally when they are purchasing gifts for others and heavily during the Holiday season. There may be a seasonal opportunity to sell these categories as gifts, since spa-goers will be in the body care gift-giving frame of mind when visiting spas from November through Christmas.

Hair Care

- Shampoo
- Conditioner
- Hair coloring agents

This category appears in many salon and spa retail units, the only kind of spa where we feel this category logically fits as an extension of the spa’s service expertise. Beyond this kind of day spa, we see little resonance with spa-goers. Spa-goers, especially female ones, are loyal to purchasing hair care products from their trusted hair care professionals (e.g., stylist, colorist). If not purchased from these professionals directly, spa-goers often learn about hair care products at salons and then purchase them from drug stores and discount beauty supply stores due to perceptions of convenience and more affordable prices.

Product Categories with Mediocre Appeal: Indulgence Products

Generally speaking, skin care products that focus on Indulgence orient to the primary spa driver for many spa-goers. However, we see enough behavioral barriers to purchasing these products at spas to warrant a conservative estimation of how much one can expect from this category.

Drivers

- Finding products not available at any other high end body care retailer that allow spa-goers to re-create the *pampering* sensory environment of the spa experience (see section below on products that re-create the spa ambiance at home)
- Finding products that contain rare ingredients from the indigenous environment in which the spa is located (see section below on Indigenous Active Ingredients)

Barriers

- Is a low-stakes driver in terms of long term value to spa-goers...why bring it home?
- Indulgence is not relevant every day at home in the same way as Escape and Work are
- If the spa-goer's visit to the spa itself orients to Indulgence, then they may not see the point of purchasing even more Indulgence "on their way out"
- Indulgence skin care products are already much better merchandised and developed in high end boutiques that most spa-goers love and frequent (e.g., L'Occitane, Lush, Origins)
- Indulgence skin care purchasing is limited to gift-buying occasions for many spa-goers

Strong Product Categories

There are three kinds of strong product categories to contemplate:

- Products that extend a spa's most distinctly well done service experiences
- Products that re-create spa ambiance at home
- Products with indigenous active ingredients

Products That Extend a Spa's most Distinctly Well Done Service Experiences

This is perhaps the strongest category for spas to truly merchandise well, because it is an extension of what Mid-level spa-goers feel is the primal benefit of spas: the ability to get Work done on their bodies and skin.

Products that promise the ability to extend spa Work feasibly into the home, especially through use of more optimal tools and skin care products, will leverage a spa's reputation as an authentic knowledge center about skin care. Since many spa-goers assume that spas employ experts in skin care, transferring skin care knowledge grounded in concrete product solutions can help build the spa's reputation for exceptional service and as a place for Work to be done.

- Everyday Facial Care Products for the Home:** Spa-goers perceive spas as excellent resources for facial care products. Spa-goers are in a perpetual state of openness to the “silver bullet” facial care product. The purpose of the product varies by consumer, but anti-aging and improved skin quality (e.g. tone, texture, color) are frequent goals. Hence, most consumers do not exhibit complete brand or product loyalty and frequently try new products with the hope of finding the “ultimate answer.” Despite this search, they are more wary of flippant, poorly informed, experimentation on their faces than on concealed body regions, because the face is a highly public onstage area of the body and is subject to others’ gaze and judgment. Consequently, there is much at stake when experimenting with products on this region of the body. Spa-goers view facial treatments as an opportunity to experiment with a product before purchase to determine whether their skin will react favorably. However, most spa-goers report they are unlikely to purchase new facial care products after only *one* exposure to the product (i.e. the facial itself). Receiving a trial size sample gift at the end of the treatment would greatly enhance the likelihood of eventual product purchase. A trial size that permits several applications, enables spa-goers to have the tactile experience of working with the product, and it provides the opportunity for them to measure presence of side effects and overall product efficacy.
- Weekly Manicure/Pedicure at Home Products:** Since manicures/pedicures are things spa-goers feel they can do at home, there is a feasible opportunity to sell exactly what was used during the spa treatment so that consumers can feel, at least, that they don’t have to come as often to the spa for these services. In truth, our research suggests that purchasing these kinds of products won’t really affect frequency rates, because the draw in this category of service is the fact that one can avoid the effort/mess of doing either by one self at home.

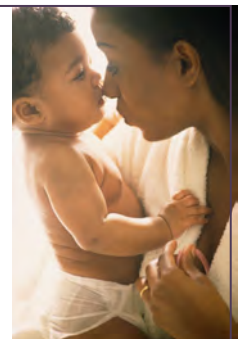
Products that Re-Create the Spa Ambiance at Home

The most frequent and easiest means by which spa-goers can extend the spa experience at home is through a recreation of its often quite memorable ambiance. This taps directly into the Escape driver, something most spa-goers and Non-spa-goers act on at home already. We found that spa-goers enjoy recreating the spa ambiance just to revel in moments of tranquil relaxation at home, however fleeting. Popular ways of re-creating this ambiance often focus on easy-to-stage, easy-to-do-alone activities that might also transpire in the spa: bath, manicure, pedicure. Most importantly, though, spa-goers

TREND ALERT

The Spa Baby

Products designed for baby that are used by baby and mom for at-home use are desirable.



routinely consume the props of the spa experience to help them re-create aromatic, visual and auditor elements of the spa ambiance.

Products the spa uses to create ambiance for its clients should be on sale and cleverly communicated as such during key transitions within the spa experience: lobby and waiting lounges.

Examples include:

- Candles
- Scents/fragrances to use on the body or within rooms
- Aromatherapy diffusers and essential oils
- Spa music used at the spa on a regular basis (favorite picks by therapists)
- Teas (served in the lobby/waiting lounges)
- Heated wraps
- Eye shades
- Clothing (e.g., high thread count robes, slippers, etc.)

Note on Ambiance Products as Optimal Spa Gifts: Spa-goers reported purchasing spa ambiance products as gifts for others more frequently than facial or skin care products, because individuals' tastes are not as refined or developed for these products and the risk of skin reactions are lessened with many of them (since most don't require bodily contact at all).

Note on Power to Brand a Spa Through Ambiance Products: Products focused on creating aromas, special forms of light or sound, can easily become marketing tools for a specific spa since they will be used in public areas of spa-goers' homes as well as private ones. These public branding agents remind the spa-goer to return not through mailers, flyers, e-mail reminders but through direct tapping of sensory memories associated with the spa experience itself.

Products with Indigenous Active Ingredients

One particular area of authenticity that the Spa World can leverage in terms of product sales is to sell products based on the efficacy of indigenous active ingredients. This involves leveraging the natural efficacious qualities of substances naturally occurring within some easily understandable geographical/cultural locale.

To do this, however, requires a significant origin narrative that explains how an active ingredient is both unique and native to some local natural world.

The following represents a rough hierarchy of authenticity when making the indigenous active ingredient claim:

- **Indigenous to the spa's local environment:** Spa-goers find the most authenticity in active ingredients derived from natural sources from the spa's local ecological environs.
- **Indigenous to Europe:** Spa-goers attribute high quality to products imported from Europe. Given spa-goers perception of the spa industry's European origins and the locus of cosmetic innovation as ultimately European, they perceive these products as being inherently authentic, superior quality, and maximally effective.
- **Indigenous to a non-European 'somewhere else':** This strategy works less well when the theme of indigenous ingredients pertains to a truly natural, but ultimately foreign/distant, world. For example, marketing indigenous active ingredients from rural Tibet in a Chicago spa comes off more as a marketing gimmick than truly authentic. Spa-goers who encounter this kind of ingredient marketing may easily decide that they can get this "Tibetan" item elsewhere for less, since it is clearly available outside of Tibet.

TREND ALERT

Trend: Indigenous Products for African-Americans

For many socially conscious African American spa-goers, the highest quality spa products are imported from Africa. Again, the indigenous nature of the products provide cues of authenticity and efficacy. African American spa-goers associate the following benefits with these products: uniquely formulated for African skin, made of natural ingredients, and support for African communities and peoples.

Hypothetical product examples:

- Dead sea salt
- Vancouver Island sea kelp exfoliate
- Flagstaff mud
- South Indian flower/botanical essences
- Javanese mango fruit extract

Spa Type Specific Recommendations for Merchandising

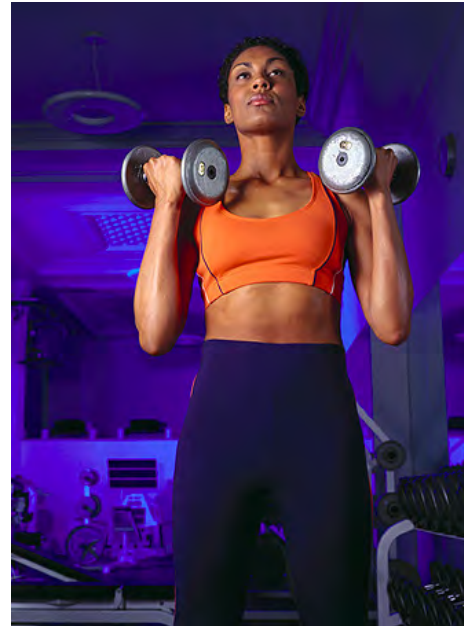
Beyond the Day Spa, appropriate products will vary by spa type given the distinctive experiences available at each type of spa and the unique purposes that they fulfill for spa-goers.

Products for the Destination Spa

Spa-goers seek destination spa experiences primarily to consume the possibility of lifestyle transformations: whether physical, emotional, spiritual or holistic. Consequently, products that offer concrete tactics to extend or integrate what consumers have learned or experienced, after their return home, are particularly appealing.

Examples:

- Self-help books
- Cook books
- Yoga kits
- At-home fitness tools



Products for the Resort/hotel Spa

Spa products have very little relevance in the resort/hotel spa context because resort/hotel spa-goers are generally not thinking about their everyday at home life when inside these settings. The entire experience of being at a resort/hotel spa, typically on vacation, is a break from everyday life. An exception here would be business travelers who take advantage of resort/hotel spas. For this group of resort/hotel spa-goers, our general findings on spa products should hold true, since Escape and Work are the primary drivers for them.

Spa products that can fulfill the function of an “archeological gift” **are** of interest to the resort/hotel spa-goer. Products featuring indigenous active ingredients or tools to re-create the spa ambiance could create the ultimate souvenir of the resort/hotel spa experience.

Products for the Medical Spa

A large proportion of spa-goers at medical spas will have tried numerous skin care products that simply do not work on their persistent skin problems. There is a huge opportunity for customized skin care products in this context. Spa-goers would welcome products that are formulated to meet the needs of their unique skin type and presenting concerns. These products would be almost prescription level in their complexity. In addition, products that manage side-effects (e.g., skin dryness, redness, inflammation) of ongoing medical spa treatments would be beneficial.

Examples:

- Custom formulated skin care products for everyday use

- Custom formulated skin care products for permanent skin transformations (shape, texture, moisture level, etc.)
- Highly validated skin care solutions available nowhere else (exclusive brand distribution rights may help build this mystique)
- Hypoallergenic skin care products to extend/enhance the Work done during treatments

Spa-Goer Orientation to Natural/Organic Products

Consumers in the Mid-level and Core are orienting more to spa products containing natural or organic ingredients, because they perceive them to be of a higher quality than conventional mass-produced products.

Spa-goers can not articulate the difference between “natural” and “organic” and tend to conflate the two terms. They also can not concisely articulate the specific benefits of natural/organic skin care products, although those who have allergic skin problems tend to trust them more due to a perceived absence of “harsh” chemicals.

Note on interference from Work driver: Mid-level and Core spa-goers seeking *dramatic* skin changes (i.e. serious Work) that require strong chemicals to achieve the desired benefits will accept the use of these chemicals, since they are perceived as temporary risks at most.

Spa-Goer Orientation to Product Aromas

Mid-level and Core spa-goers are also orienting toward natural scents: citrus, woody, herbal, and earthy as opposed to floral, perfume-like, or chemical. Lavender is a scent that seems to have the most widespread appeal across all segments of the Spa World.

Key Findings

- Sampling is key to driving product switching/experimentation in skin care, which is the category spas generally play in most logically in spa-goers’ eyes.
- Product categories that focus on the following tend not to be great for spa merchandising: everyday skin care for body regions (e.g., moisturizers, skin cleansers, exfoliants) generally covered by clothing, and hair care
- Strong product categories at spas include those that extend well done service experiences, re-create spa ambiance at home, and products with indigenous active ingredients
- Spa-goers perceive spas as excellent resources for facial care products.
- Spa-goers are in a perpetual state of openness to the “silver bullet” facial care product.

Recommendations

- Spas can create the greatest distinction by merchandising products according to Mid-level and Core spa drivers, Work and Escape
- Effective merchandizing considers the spa type
 - Destination spas: provide products (e.g., yoga kits, cook books) that extend the spa experience to the spa-goer's home life to reinforce the possibility of a lifestyle transformations
 - Resort/hotel spas: provide products with indigenous active ingredients as the ultimate souvenir, or archeological gift
 - Medical spas: provide customized skin care products that are formulated to meet the needs of spa-goers' unique skin types
 - Day spas: provide products that extend the spa's most distinctly well done services, products that re-create spa ambiance, and products with indigenous active ingredients where possible



Spa Drivers in Non-Spa-Goer Lifestyles

Significant barriers exist between non-spa-goers and the Spa World. Yet, the forces driving spa-goers to spas are extremely relevant to non-spa-goers. Indeed, to the non-spa-goers we interviewed, the motivations of Escape, Indulgence, and Work are very much at play in their lives.

Escape

In the eyes of committed spa-goers, spas provide one of the only service venues in North America where a clean break from the stress and anxiety of social life is not only possible but also legitimate. To Non-spa-goers, however, spas tend to be less legitimate spaces for Escape. In fact, spas tend to represent disagreeable aspects of social life from which temporary escapes are sometimes required.

Me-Time: Gaining Distance from Social Relations

Given that Escapes function as reprieves from social pressures, it should not be surprising to find contemporary adults periodically coping with social anxieties and stress largely *on their own*. And, indeed, many of the Non-spa-goers whom we interviewed routinely enact isolated

ritualized activities that temporarily set them off from social life altogether. Examples run the gamut: some meditate, some “zone out” on television, some curl up with a good book, some take prolonged showers and baths. Whatever they do to achieve a sense of Escape, the intention remains essentially the same: to create personal, sanctified “me time” free from direct contact with living, breathing people. Me-time, or time away from social relations, is a powerful form of Escape in the lives of many of the non-spa-goers with whom we spoke.

Home as ‘Haven in a Heartless World’

Many non-spa-goers routinely achieve a sense of Escape within the confines of their houses and apartments. Sometimes simply closing the door, drawing the shades, and avoiding phone and email communication is enough to transform a home into a sanctuary. Sometimes additional steps are required to truly unwind from the deep psychological, emotional, and economic entanglements of social life:



- One study participant self-consciously removes herself from the lure of email and work by retreating to the technologically primitive context of her backyard.
- Another wiles away workday evenings basking in the warm glow of a fireplace and the effects of cheap red wine.
- For others, long, dimly-lit soaks in the tub provides an ‘every now and then’ experience of “getting away from it all.”

However it happens, Escape tends to assume an extra significance when sought after in one’s home environment. To the non-spa-goers with whom we spoke, homes often double as “havens in a heartless world.”

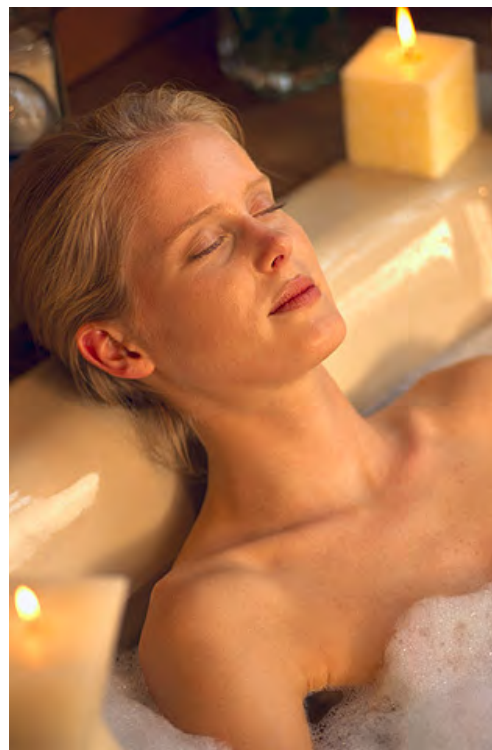
The Felt Need to Escape Home-life

Of course, home life, especially for those living with others, can come to represent forces and dynamics from which adults feel compelled to Escape. Escapes may be spontaneous in such circumstances, such as the spouse who exits a domestic quarrel by “going for a drive” or a walk. Or, they may be routinized aspects of a person’s lifestyle, such as a female non-spa-goer who, on a weekly trek along a familiar coastline path, enjoys the experience of getting “lost” in her thoughts. Sleep, interestingly, also doubles as an Escape from home-life (and life more broadly). In different ways, the non-spa-goers we spoke to tend to seek out temporary Escapes

from home life, whether spontaneously or ritualistically, in order to gain temporary distance from the practices associated with the duties, obligations, and experiences that inhere in domestic relations.

The Cultural Value of “Away”

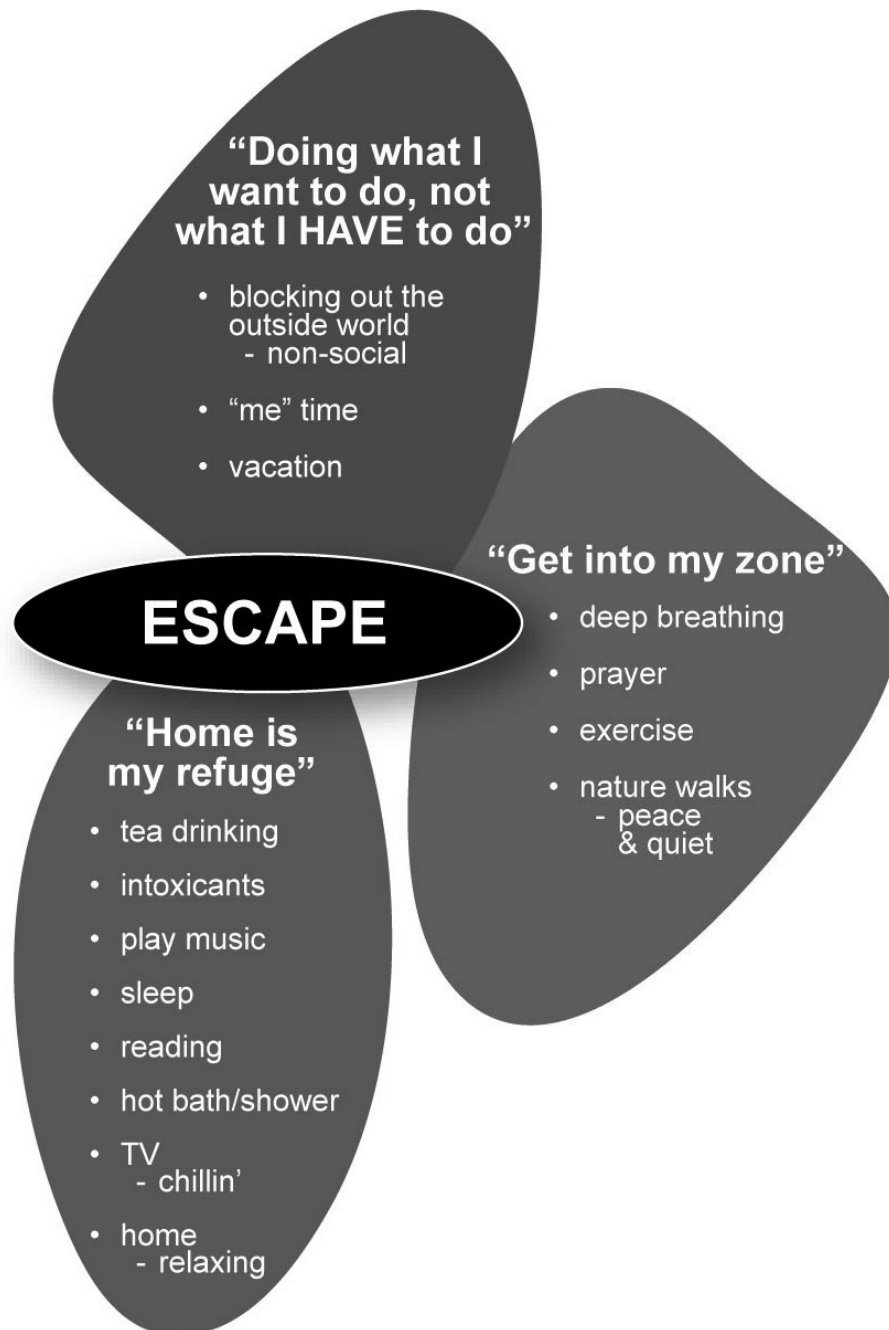
The value of Escape derives primarily from its subjective basis in being “away” from social contexts that represent either the actuality or the possibility of disagreeable life experiences. Experientially, being “away” can happen on many levels: mentally, emotionally, sensually, physically, spiritually, symbolically, etc. One can, for example, mentally Escape a concrete situation by daydreaming, praying, or having a Zen moment. On the subjective level, the value of being away tends to be high regardless of the form it takes. Culturally, the value of being away is reflected in popular desires to “not be at work” as well as the extraordinary significance of vacations, trips, and fantasies of “leaving it all behind.”¹¹



Common language used by non-spa-goers to describe the terms “temporary escape,” “pampering,” “relaxed,” “calmed,” “seclusion,” and “relief from stress” reflect many of these themes. The following language map depicts this consumer language. To reiterate, a basic strategy for reading the map is to see the larger fonts on each map as primary associations. The smaller fonts represent sub-themes, excerpts of spa-goer speech, or qualifications of the main thought.

¹¹ These themes also shed light on why it is so many spa-goers use the metaphor of “journey” when describing the experiential structure of their spa visits. The emotional journey of spa-going, that is, is as much a movement towards certain types of experience as it is a movement away from other types of experience.

Figure 14
Escape Language Map



Non-spa-goers view Escape as "me time" and they typically achieve that through at-home or outdoor activities and introspective practices. Given the harried pace of life in North American societies, it is hardly surprising to find adults placing high values on activities and spaces affording "time out" or "time away."

Implications for Marketing to Escape:



- Highlight the escapist qualities of certain spa treatments in menu descriptions, and/or reorganize spa menus to categorize treatments that offer escape as one of the primary benefits (e.g., hydrotherapy soak, body wraps)
- Identify spas as “havens” from the social world (e.g., a quieter home away from home)
- Depict spa spaces that offer seclusion in brochures (e.g., meditation rooms)

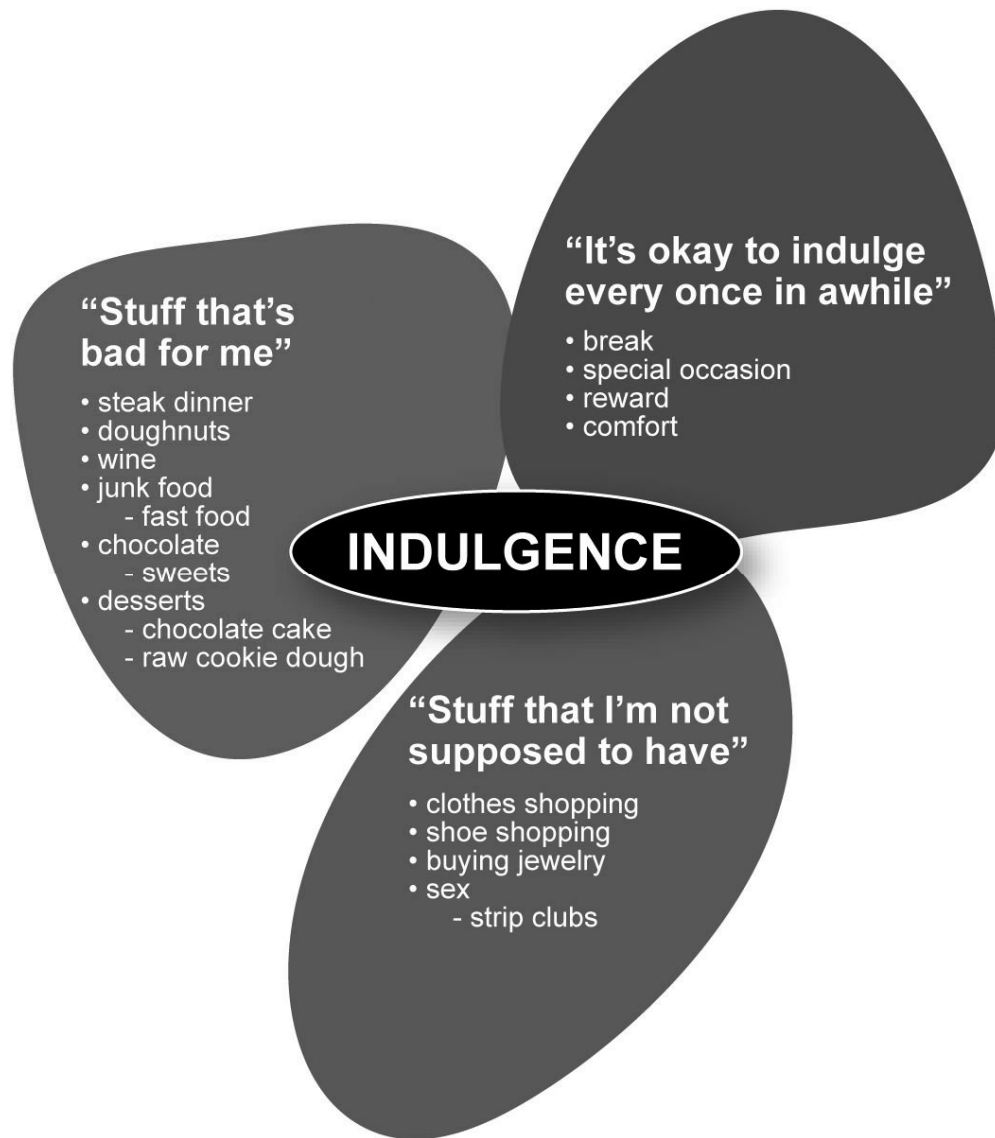
Indulgence

Like many of their spa-going counterparts, non-spa-goers tend to be ambivalent about their relationship to indulgent practices, activities, and objects. On the one hand, Indulgence plays an important role in the typical non-spa-goer’s efforts to live a meaningful, satisfying, even “happy” life. On the other hand, too many Indulgences can quickly undermine ongoing efforts to cultivate a sense of oneself as a mature, healthy person leading a “balanced” life. In the lives of the non-spa-goers we interviewed, that is, Indulgence is a fundamentally ambivalent thing.

“Guilty Pleasure”

The ambivalence of Indulgence is reflected in the way non-spa-goers associate two activities with Indulgence: shopping and eating. In terms of the former, it’s common for non-spa-goers to self-consciously enjoy spending money on items they want but “really do not need”; in terms of the latter, it’s common for them to self-consciously enjoy eating food they crave but “really shouldn’t eat.” In both cases, consumers often frame their Indulgences as “guilty pleasures.” Common language used by non-spa-goers to describe “being indulged” indicate that “guilty pleasure” is broadly associated with Indulgences in their lives. The following language map depicts this consumer language.

Figure 15
Indulgence Language Map



As many of the themes on this map suggest, non-spa-goers are likely to be simultaneously pushed from and pulled toward anything that represents Indulgence to them. And, as a result, once the pleasure of the activity dissipates, a purer experience of guilt is likely to remain. In this context, indulgent opportunities that provide effective, easy-to-use tools for coping with post-Indulgence guilt are likely to be especially appealing to non-spa-going consumers.

The Moral Value of Self-Control in a World of Indulgent Temptations

Non-spa-goers sometimes feel as though the entire social order is organized to supply opportunities for Indulgence. As a result, they talk about a felt need to carefully monitor and

control themselves in relation to an unending stream of temptations. In this context, self-control and personal discipline become important indicators of moral character to the non-goers we interviewed. Indeed, many of the non-spa-goers with whom we spoke define their own moral character largely in response to how they “control themselves” in the face of indulgent opportunities.

Balance and Moderation: Keys to Self-Control

Recognizing the impossibility—and unattractiveness—of total abstinence from Indulgences, many non-spa-goers come to frame “balance” and “moderation” as key ingredients of their lifestyles and personalities. Though they will occasionally “splurge,” they generally consider not getting too much or too little Indulgence an important dimension of their pursuit of a version of “the good life.”

Honorable Pathways to Indulgences

Though indulging is often occasion specific and highly personal, our research suggests that non-goers approach opportunities for Indulgence along four widely honored pathways:

1. Many of the non-spa-goers we interviewed turn to Indulgences as **rewards or gifts**. There is a deep pattern of rewarding oneself or others with Indulgences for accomplishments, good performances, and any number of personal “achievements.”
2. Many people turn to Indulgences for comfort when life is not going well for them. There is a strong connection in the lives of many between rough times and guilty pleasures.
3. Indulgences serve as breaks or treats from the petty trials and tribulations of mundane life. Minor Indulgences in everyday life allow adults to experientially step out of the hum-drum and into zones of momentary pleasure.
4. Indulgences are often integral aspects of ‘special occasions.’ Indulgences play a vital role in celebrations, for example, ranging from lunch with an old friend to weddings.

Of course, this is not an exhaustive list of how non-spa-goers orient to indulgent opportunities; rather, it begins to reveal powerful ways in which legitimate pathways to Indulgence are pre-patterned by culture, and not solely matters of personal choice, taste, or individual inclination. When communicating (i.e., marketing) legitimate pathways to Indulgence to consumers it is important to use language that resonates with them¹².

¹² ISPA 2004 Consumer Trends Report: *Variations & Trends on the Consumer Spa Experience* identifies consumer language that reflects the themes: Escape, Indulgence, Work. This report is available at www.experienceispa.com

Implications for Marketing to Indulgence:



- Communicate the benefits of spa-going as a “guiltless-pleasure” (e.g., calorie-free, often less costly than a shopping spree) using appropriate consumer language
- Honor the discipline and restraint of those who only indulge sparingly
- Categorize and describe treatments on spa menus to reflect acceptable Indulgences:
 - *Reward* your hard work with a pedicure
 - *Comfort* a disappointment with a massage
 - Take a *break* from the everyday with an invigorating body polish
 - Make a *special occasion* truly special with a facial
- This three-prong approach to marketing Indulgence can be presented in one document

Work

Whereas Escape and Indulgence are occasional activities in their lives, Work seems to have become nearly ubiquitous in the lives of many of the non-spa-goers whom we interviewed. They apply the term Work to a wide spectrum of phenomena, ranging from subjective states (“happiness”) to institutional stability (“lasting marriage”). That Work, often “hard work,” is required to achieve certain things in life (e.g., successful career, healthy body) has become a taken-for-granted feature of social reality not only to the non-spa-goers we interviewed but also to most people in North America. Consider, for example, that many adults even Work while they’re asleep, hoping that solutions to work-related problems will occur to them while they slumber.

Today’s Never-ending Need to Achieve

The broadening applicability of the Work metaphor to wider territories of social life reflects not only intense economic pressures but also the weakening power of tradition and community to act as guides for behavior and thought in everyday life. Individuals must now achieve what was once “given” by tradition and community, including a clear sense of “who they are,” “what they are about” and how to most appropriately carry out their lives.

In this context, the non-spa-goers we interviewed find that much of their personal lives are not only open to negotiation, interpretation and willful change; they also find that core aspects of life must be self-consciously and intentionally achieved through conscious effort, i.e., Work. Common language used by non-spa-goers when talking about various types of Work in their lives reflects these themes. The following language map depicts this consumer language.

Figure 16
Work Language Map



The themes on this map reflect a broader truth to our study participants—they feel compelled to continually adapt to complex, shifting life circumstances in contemporary North American society. To successfully navigate the waters of everyday life, they cannot depend upon traditions or communal life to provide adequate guidance or instruction. Life, to them, is a “do

it yourself” project that requires conscious effort. In this context, it is not surprising to find these adults integrating highly ritualized activities into their affairs to provide themselves with a sense of structure and balance and to counteract the stress and anxiety of life.

Feeling Anxious But Acting Natural

The ubiquity of Work is likely to maintain or heighten the value of temporary Escapes and Indulgence in the lives of the non-spa-goers with whom we spoke. These people, generally speaking, live harried lives under unrelenting economic pressure and profound social changes in their personal lives. They feel pressured to carve out and accomplish their own personal goals and aspirations. Their family and intimate relationships are fluid and changing. They cannot take for granted their social and economic status but must instead continuously accomplish their ‘place in the world.’ In these circumstances, they regularly encounter lifestyle challenges without obvious solutions and they regularly encounter basic challenges to securing trustworthy footholds in social relationships. As a result, they experience diffuse anxieties as a matter of routine. It is in this context that the term Work gains broad applicability to the internal and external dimensions of their lives.

At the same time that they are Working in all corners of their lives, they also feel morally compelled to act as if they are naturally adept at managing the unending stream of complexities and changes that life presents to them. If for no other reasons than these, the non-spa-goers we interviewed will undoubtedly continue seeking out regular—and highly valued—breaks, Escapes, and time “away” from the complex, shifting, and anxious character of adult life. They are also likely to experience a deep sense, from time to time, that they deserve rewards for the efforts they pour into their lives.

The Pursuit of What’s “Real”

Given their life circumstances, the non-spa-goers we interviewed are apt to seek Escape, Indulgence and Work at places offering a deeper sense of authenticity, meaning and soul than they perceive to be available at spas. For instance, non-spa-goers will employ the services of solo practitioners to obtain massage, reflexology, detoxification, etc. because they perceive these practitioners as expert specialist offering the most authentic services. What non-spa-goers crave, above all else it seems, is help attaining and maintaining a sense of “life” and “who they are” that is authentic, deep, and trustworthy—i.e., “real.”

Implications for Marketing to Work:



- Communicate that spa activities help one Work better *in all areas of life* (i.e., enhance physical performance, boost professional productivity, reduce stress, increase focus)
- Inform non-spa-goers of the “balance” that can be achieved with regular spa-going
- Communicate the efficacy and authenticity of Work performed in spas

Hierarchy of Non-Spa-Goer Drivers

While all of the drivers (Escape, Indulgence, Work) that draw spa-goers to the Spa World are relevant to the non-spa-goer, it seems that one driver is most salient. In marketing to the non-spa-goer, it is likely that messages pertaining to the Work driver will have more impact given the centrality of Work in the non-spa-goer’s life. The Escape driver is next most salient to the non-spa-goer and is followed by Indulgence. It is important to note that the vast majority of the North American population is a non-spa-goer. It is this mainstream consumer who has difficulty incorporating regular Indulgence into their lives due to psychological barriers around personal pampering (see following section, *Spa-going is Indulgent*, for more details).

Essentially, beyond the rare special occasion, the mainstream American consumer is unlikely to spend money on regular Indulgence. The spa industry must be empathic and speak the language of this consumer in order to communicate the relevance of the industry to their lives. To effectively communicate with this audience, use their language, target their motivations, and overcome their unique barriers.

Spa Use Barriers in Non-Spa Lifestyles

The defining characteristic of the non-spa-goer is that they have never entered the Spa World, or they have not returned after one or two experiences within the World. These consumers primarily fulfill spa driving needs through experiences that they can provide for themselves. In the case of the Work driver, if unable to provide the desired outcomes for themselves, non-spa-goers seek the services of solo practitioners. There are several barriers that prevent non-spa-goers from seeing spas as viable resources.

General Impressions and Stereotypes

The overriding impression of spas is that they are “fluffy” places full of “fluffy” people. There is a sense that spas are oriented toward superficial concerns such as beauty and youthfulness. Many non-spa-goers, for example, view spas as expensive establishments dedicated to the

production of superficial pampering for shallow people. To those who make these associations, spa clientele are perceived to be wealthy, spoiled, selfish, “vacuous” people with whom it would be uncomfortable to rub elbows and unthinkable to befriend. Further, many non-spa-goers imagine spa personnel to be equally shallow, insincere and superficial. When non-spa-goers acknowledge that some spas try to promote wellness, these spas are deemed disingenuous and insincere in their approach. Substantial doubt and skepticism surrounds the spa as a place of wellness, because the industry is viewed as being rooted in vain and/or cosmetic pursuits. It is highly unlikely, in the minds of non-spa-goers, that any desired wellness states could be fully realized in the spa environment. Before entry into the Spa World for Work, non-spa-goers would need to see acceptable therapist credentials and hear trusted anecdotal evidence of efficacy.

It is the simple word “spa” that conjures a range of unfavorable meanings and images in the minds of most of the non-spa-goers with whom we spoke. Common language used by non-spa-goers to describe “spa,” spa clients, and spa employees reflect these themes. The following language map depicts the non-spa-goer’s general impressions and associations with the word “spa.”

Figure 17
Non-Spa-Goer Language Map



Non-spa-goers primarily associate spa with luxury and expense, and consider them superficial places. Spas are also conceptualized as inessential, hyper-feminine, elitist, and inauthentic. In sharp contrast to spa-goers, non-spa-goers do not view spas as havens where they can enjoy themselves. Beyond these negative impressions and stereotypes, the non-spa-goer has little or no actual awareness of spas and their services. Non-spa-goers are not aware of spas in their local communities and/or are uncertain about the types of services offered at spas. Most non-spa-goers assume that manicures, pedicures, and massages are standard spa services. However, these consumers do not have a clear understanding of what these services entail, and they do not possess any knowledge about service variations or specializations (e.g., Swedish Massage, Shiatsu, Thai Massage). Stereotypical images of treatments that involve lying in warm tubs of mud are also surmised to be among the more exotic spa treatments. Non-spa-goers imagine that spas are very expensive places that only the affluent or very self-indulgent frequent. Importantly, non-spa-goers had no idea of actual spa service prices, but described them as “expensive” (e.g., \$80-100 per service).

Spa Going is Indulgent

As previously stated, the non-spa-goer orients to the same drivers as the spa-goer: Escape, Indulgence, and Work. However, non-spa-goers typically fulfill these needs with experiences that they can provide for themselves at little or no monetary cost. Although non-spa-goers acknowledge that some spa treatments might be enjoyable (e.g., massage), they view treatments as non-essential to their daily lives. There are three psychosocial factors at play here. First, there is a strong sense of self-reliance and asceticism among non-spa-goers. Consequently, substantial guilt would be experienced by non-spa-goers if they selfishly squandered resources on an experience they could achieve or approximate on their own, and some degree of guilt would still be felt for experiences unattainable on one's own. The sentiment is, “No one is going to die if I don't get my nails done or have a massage this week.” Basically, the non-spa-goer does not see the *value* of a spa experience as sufficient to justify the expenditure of their resources (e.g., time and money).



Second, beyond not seeing the worth or value of spa treatments, sometimes the non-spa-goer communicates a lack of self-worthiness. In this sense, non-spa-goers do not object to others' self-indulgence and they can see the value of the spa experience to those people, but they do not view a broad array of indulgent activities and experiences as relevant to them, personally. Though non-spa-going consumers do not clearly understand the origins of their diminished self-

worth, they do know that they are not that “indulgent type of person,” and hence, they are less likely to ever enter the Spa World. For example, Lucy commented:

Becky has her nails done every week, or her eyebrows tinted, or whatever it is that she does. That's just how she is, and she's proud of it. She's not ashamed of it in any way. If she can afford it, why not?....I'm just not used to having that kind of lavish expense for me!”

Third, beyond honorable pathways to it, Indulgence is not apt to resonate deeply with non-spa-goers because they have trouble reconciling it with the central and significant place of Work in their lives. In a general sense, Indulgence suggests itself to non-spa-goers as unrelated to their goals, aspirations, and efforts to accomplish and achieve ‘things’ in life.

No Social Network Driver

Non-spa-goers tend not to have friends or family members who patronize spas. These consumers consider their social networks as the most credible sources of information. The next most credible source of information is other consumers. Non-spa-goers indicated that spa-review websites or spa consumer blogs would be trusted sources of information for selecting a spa and for understanding treatment options, benefits, and risks. The absence of a knowledgeable social network contributes to the non-spa-goer’s lack of awareness and understanding of the Spa World. It also limits the likelihood of the non-spa-goer entering the Spa World, as many of these consumers indicated that they “might” go if a friend convinced them of the effectiveness and benefits, or went with them to ease the awkwardness of a new experience.

The non-spa-goer believes that spa patrons do not fit with their own social networks or self-image. As described above, the spa-goer is construed as an affluent, vacuous, and superficial people who would have little in common with our non-spa-goers who self-describe as average, down-to-earth, and real. Spas are not places where they would run into friends, develop relationships, or even have comfortable casual conversations.

Influences of Gender

Spas are gendered spaces. The word “spa” conjures up images that are stereotypically feminine. Even with the presence of men, spas are feminine spaces because of design elements (e.g.,

TREND ALERT

So many spas....so little authenticity

There is increased skepticism among non-spa-goers when faced with the rapidly increasing number of spa retail units. The back-of-mind question is, “How effective are these services if everyone, and anyone, can provide them?” In the absence of a social network to rely on, non-spa-goers need a credible testimonial-based guide to spas (e.g., Zagat); not an industry-created catalog of spas.

pastel colors), purposes (e.g., emphasis on beauty), services (e.g., manicures, pedicures, facials, make-up application), and inhabitants (e.g., a high proportion of female staff and clients). In fact, female non-spa-goers imagine that the spa environment, clients, and staff reflect a hyper-femininity that they, themselves, do not possess.

Some female non-spa-goers explain that they do not wear a lot of (if any) make-up and do not spend a lot of time on their overall appearance including hair and clothing. These women prefer to look “natural” and wish to focus their energy and money on things other than their face and body.

The female non-spa-goers identified some of their passions as photography, flight lessons, reading, hiking, exercise, pets, careers, friends, and family. This is not to say that spa-going women, in fact, exhibit hyper-feminine identities, but it is this *perception* that keeps the female non-spa-goer from seeing a connection to the Spa World. Unfortunately, a person’s perception is their reality regardless of objective evidence to the contrary. While women possessing alternative feminine identities may not see spas as inviting and comfortable spaces, they will likely be more at ease in these spaces than men.

Importantly, men represent a small, but growing segment of consumers involved in the Spa World. Men will experience the feminine nature of the spa environment even more acutely than the alternatively feminine woman.

The Allure of Massage to Male Spa-Goers

Some men, not strictly metrosexual in lifestyle orientation, are irresistibly drawn to the therapeutic effects of massage. In general terms, these men fall into one of three sub-categories:

TREND ALERT

Men’s Spas

Men are increasingly likely to rapidly evolve with the Spa World once they enter, becoming high-paying, high frequency clients if a spa can speak to them well. To ensure a connection to these consumers, orient menus to men replete with men-only treatments.



athletic, corporate, spiritual. In terms of the first two of these sub-categories, massage is sought after to relieve the effects of sport and work on the body and mind and to optimize the body and mind for peak performance in these arenas in the near future. In terms of the spiritual sub-category, massage is framed as a means to healing and making experiential contact with repressed or damaged aspects of the self.

Converting the non-spa-going male will require protecting his traditional male gender identity. Deepening the metrosexual male spa-goer's involvement in the World will require meeting men's specific grooming and pampering needs with gender-specific expertise and services in environments that are not hyper-feminine.

TREND ALERT

The Metrosexual Male as Spa-Goer

It is likely that men who are comfortable with spa-going recognize that gender identity is fluid. For these men, spa-going poses little threat to their ego. Popular culture has dubbed these men "metrosexual," a term broad enough to encompass men of any sexual orientation who consider the aesthetic qualities of their appearance central to their identity and who also consciously cultivate a clean and crisp, urban lifestyle. These men draw explicit ties between spa-going and their ability to perform effectively on the dating scene, in corporate culture, or in athletic activities. Of course, Indulgence and Escape play important roles in the typical metrosexual male's attraction to spas, but these drivers are less likely to play central roles in the spa-going narratives he spins for the benefit of others.

To the average metrosexual spa-goer, his willingness to undergo face-based services and manicures signifies a move "beyond" restrictive, traditional notions of masculinity. This move is further reflected in his willingness to care for himself for aesthetic purposes and to consciously seek out pampering experiences.

Though drawn to spas and open to traditionally feminine practices, the metrosexual spa-goer is nonetheless slightly put off by the tendency of spas to cater to women. It is not enough, in his mind, that spas offer product lines for men or that they color the environment in gender neutral tones. These touches are appreciated, but they are perceived as superficial to the experienced male spa-goers who believes that men have vastly different needs than women. These men want to know not only that a spa appreciates the distinctive needs of men. They also want to know that spa technicians are trained and experienced in meeting these distinctive needs. Thus, though these men tend not to be loyal to any spa or therapist in particular, they are nonetheless drawn to "all male" day spas for their presumed expertise in the area of male needs.

Nudity

Given non-spa-goers' general lack of awareness and knowledge of spas, it is unsurprising that they exhibit misconceptions surrounding nudity within the Spa World. Non-spa-goers



frequently assume that they will be required to be nude for some services (e.g., massage) and in some spa spaces (e.g., hot tub, sauna, steam room). There is a fear that being nude is to be completely exposed to others with no considerations for privacy or modesty. These consumers are unfamiliar with spa etiquette that permits clients to determine their degree of undress while at the spa. Furthermore, there is no understanding of the techniques that therapists use to preserve a client's modesty and privacy while nude (e.g., leaving the room while clients disrobe, draping with sheets and towels during body work).

As described in Chapter IV, non-spa-goers are not unique in their concerns about nudity. Like some spa-goers, non-spa-going consumers fear being nude for three reasons: 1) modesty/privacy, 2) body image, and 3) sexuality. See the section, "Evolving Deeper into the World," in Chapter IV for a detailed discussion of the inhibiting effects of nudity. Specific to anxiety over sexuality, some non-spa-goers have an underlying fear about entering the Spa World at the "wrong kind of spa" where sexual services are rendered under the auspices of "massage." As a result, even if at a reputable spa, some non-spa-goers may be preoccupied with notions of potentially sexual touch during their first massage. Without the benefit of social network links to the Spa World, it will be more difficult to dispel this misconception.

Recommendations for Converting the Non-Spa-goer

As the non-spa-goer is motivated by the same drivers as the spa-goer, it is not inconceivable that they will enter the Spa World. There are several means by which the non-spa-goer could be encouraged to become a spa-goer.

Emphasize "Work"

As stated previously, the Work driver resonates strongly with the non-spa-goer, especially when they are seeking an experience that they cannot provide for themselves. This driver can be emphasized for non-spa-goers in two ways. First, spas can stress "wellness" as their *raison d'être* and focus on establishing credibility and authenticity with well trained and certified staff in an ambiance that minimizes Indulgence cues. It is important to down-play Indulgence for the current non-spa-goer as they are suspicious of the efficacy of indulgent activities/spaces or they reject Indulgence as any part of their self-identity. De-emphasizing Indulgence does not require a Spartan environment, but it does require eliminating ostentatious and excessively elaborate or expensive design elements (e.g., imported marble statues or extravagant waterfalls). Second, spas can stress "performance enhancement" as their primary purpose. The focus of performance enhancement can be career, athletics, or personal relationships. Again, credible staff and less indulgent surroundings are essential to convey this message believably.

Corporate and Career Partnerships

In order to compensate for the non-spa-goer's lacking social network driver, it is crucial to establish some enduring connection to the non-Spa-goer's life. Career is central to North American identities and is often a source of stress and tension that requires Escape or Work. Thus, creating a link between the Spa World and the non-spa-goer's workday life may inspire participation in the World in order to maintain or achieve wellness and/or optimal job performance. This link could be created by spas forming partnerships with corporations to provide employees with subsidized wellness/performance enhancement programs. Partnering with professional associations is another means by which the non-spa-goer could be introduced to the Spa World as a credible means of achieving Escape and Work. The spa industry could have a presence at professional conferences (e.g., Wellness Resource Room) or in continuing education accreditation programs (e.g., classes on "How to Achieve Balance in Life") in order to establish this connection.

Image Neutrality

Non-spa-goers reject the Spa World largely because of inaccurate stereotypical imagery and minimal knowledge about spa treatments, benefits, and prices. To overcome impressions of hyper-femininity and frivolity, spas must do more than employ gender neutral designs and utilize "wellness and performance" language in their communications. Eliminating stereotypes and increasing general spa knowledge will require educating non-spa-goers and enabling them to experience the Spa World at minimal risk. For instance, open house events that involve spa tours, complimentary mini-treatments, food and drink, and educational elements (e.g., lectures) may help dispel non-spa-goer misperceptions to inspire participation in the World. As stated previously, to encourage the male non-spa-goer it will be necessary to demonstrate how spa-going is congruent with, or supports, a masculine gender identity.

Nudity and Privacy

Concerns about nudity plague the non-spa-goer, Periphery spa-goers, and even some Mid-level spa-goers. This concern prevents non-spa-goers from entering the world and it prevents Periphery and Mid-level spa-goers from deepening their involvement in the world. As most consumers engage in some pre-visit preparations that often include visiting the spa website, spas must make available explicit information about nudity and its management. It is not sufficient to explain that consumers can determine their own level of undress and that "careful procedures" are followed to ensure privacy. Consumers need detailed information about which treatments and which spa spaces require or are optimized by particular levels of undress. Furthermore, specific descriptions of the "careful procedures" should complement each treatment description. Accompanying photographs or video would be very helpful in allaying consumer fears about nudity, as they would clearly understand what to expect during their spa

visit. To target the non-spa-goer, specifically, this information should be conveyed at open house events and in promotional literature.

Key Findings

- Non-spa-goers orient to the same drivers as spa-goers (e.g., Escape, Indulgence, and Work) however they typically achieve these states through experiences they can provide for themselves
- Escape is equated with: “me time,” seeking solace and solitude in one’s home environment, and needing to Escape the pressures of home life
- Culturally, Escape is achieved through a sense of being “away” whether that is mental, emotional, sensual, physical, spiritual, or symbolic
- Indulgence is construed as a “guilty pleasure,” something to be managed and practice self-control, but can be engaged in with balance and moderation
- Acceptable pathways to Indulgence include: rewards, for comfort, breaks/treats, special occasions
- Work is ubiquitous in non-spa-goers’ everyday life, and this necessitates Escape and Indulgence from time to time
- Receiving an authentic and trustworthy experience is key for non-spa-goers to have Work done in order to perform better in all areas of their lives
- There is a hierarchy of driver appeal: Work, Escape, and Indulgence
- Barriers to spa-going include: negative impressions and stereotypes (e.g., spas are fluffy places for fluffy people), spa-going is indulgent, no social network driver to motivate participation, and gender role influences

Recommendations

To convert the non-spa-goer:

- Emphasize the Work driver
- Create corporate and career partnerships to create social networks for non-spa-goers
- Establish gender neutral spas to encourage acceptance among female and male clients who feel uncomfortable with hyper-femininity
- Clearly explain and depict nudity management and privacy assurance practices for each spa service

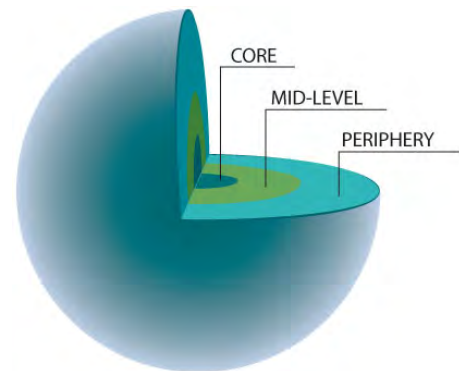
APPENDIX

I

The Hartman Model

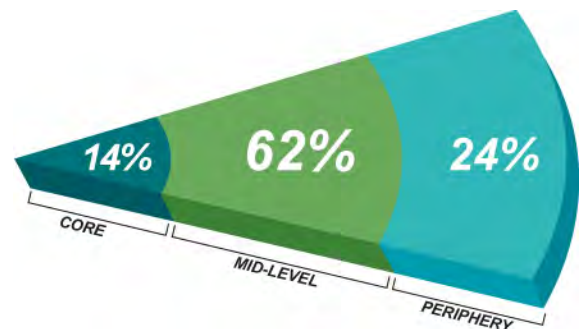
The Hartman Model was developed with an understanding that a successful marketer needs to understand not only *who* their consumers are, but also *how* to engage them in a lifestyle proposition that results in purchase. Developing this understanding of consumers requires analysis of three key lifestyle components: how consumers live, how they shop and how they use the things they buy. Since the manner of participation in most activities is uniquely determined by the activities themselves, the drivers of live, shop and use differ significantly by lifestyle.

The Hartman Group conducts consumer lifestyle analysis from what we term a “world perspective,” in which we can envision a center, the “Core,” as well as an outer edge, the “Periphery.” This in-depth lifestyle research combines traditional quantitative methods with innovative qualitative techniques drawing from sociology, anthropology and ethnography. The model adapts well to understanding how consumers live, shop and use in relation to the activities defining different product and service worlds.



The individuals and organizations in the Core are those most active in a given world of activity, while those at the Periphery are maintaining only minimal, infrequent and less-intense involvement with that world.

Typically, the people and organizations comprising the center of a given world of activity are much smaller in number than those connected to the Periphery. Even larger is the Mid-level segment, where we find the majority of consumers.



Upon analyzing a world, we can identify “dimensions of consumption,” which are the key attributes or influences that shape individual decisions in the marketplace. All of these



dimensions are linked by a common world theme (e.g. spas) with different dimensions becoming more salient as a consumer moves from the Periphery to the Core. At the Periphery are familiar key buying factors, such as price, brand and convenience; while closer to the Core factors such as authenticity and knowledge become more important.

This model is used for our consumer research and analysis and can be adapted to include key dimensions of consumption identified as critical to understanding Core, Mid-level and Periphery consumers in any product or service world.

The Hartman Model's innovative "world perspective" offers more than simply a different way to approach market research. It provides us with insights that competing firms' methods do not. In at least two significant ways, our approach moves us closer to achieving client objectives than conventional practices. First, it allows us to classify consumer behavior in a way that addresses the need to understand varying levels of involvement in the world without having to resort to simplistic segmentation schemes. Second, it permits us to analyze attitudes and values separately from consumer behavior in order to gain a better understanding of the linkages between what consumers say and believe and what they actually do.

In contrast to our method of classifying behaviors, most consumer research attempts to group or cluster consumers into a small number of segments with supposedly similar demographic or psychographic profiles. While this type of segmentation does a reasonable job of identifying the most obvious response patterns to survey questionnaires, it rarely captures meaningful consumer behavior, because it fails to represent consumer behavior as social and subject to influences that attitudinal statements do not adequately describe. Our model provides us with a context for designing, analyzing and interpreting qualitative research that is absent from standard methods of consumer research. By focusing on the occasions or situations that consumers engage in as part of a world of activity, we can assess the intensity or depth of usage without having to artificially attribute a given level of involvement to a fixed type of consumer.

With regard to the second benefit of our approach, we have found, as have many other market researchers, that consumers often say one thing and do another. In part, this reflects the difficulty of using general attitudinal data to explain or account for specific behaviors. At the same time, the attitudes expressed in surveys and in face-to-face discussions can provide important clues to general values and beliefs that significantly color the way that consumers relate to products, services and promotional messages. By not assuming a one-to-one correspondence between what people say and what they do, we can distinguish between what appeals to different sensibilities and what affects purchase decisions. In other words, we neither accept blindly nor dismiss out of hand what consumers say. Rather, we recognize attitudes for what they are—indicators of values and interests that may find expression in actual behavior

under certain circumstances. The Hartman Model enables us to identify and understand the conditions that bring about these circumstances.

APPENDIX



Quantitative Methods

This appendix describes an online survey conducted in December 2005 and omnibus telephone surveys conducted in September 2005 to understand consumer attitudes and behaviors related to spa vacations. Two separate samples, one for the U.S. and one for Canada, were used with both survey methods. The samples for both countries received the same survey (with country-specific questions for ethnicity and area of residence). Methodological details of how the data were collected and how key measures were developed are provided here.

Sampling Frame

The main samples for this study were drawn from a panel of consumers with online (i.e., Internet) access in December 2005. Therefore, the populations sampled are a subset of the national populations of the U.S. and Canada, the two countries examined in this research. Over the years, the population of Internet users has grown and extended to households from every walk of life and in every region of the world. Nowhere is this expansion more complete than in the U.S. and Canada. As a result, online samples for these two countries are generally considered to be nationally representative of their respective national populations.¹³

Because day spa use is much more common than use of other spas, quotas were established to increase representation of the use of other kinds of spas. In particular, quotas were used for day spas and resort/hotel spas. In addition to these quota groups, a third category for all other spa types was created. The three quotas for each country were as follows:

- 400 day spa-goers
- 600 resort/hotel spa-goers

¹³ In fact, online samples tend to outperform many other methods in their ability to reach a diverse consumer population. Telephone surveys, for example, must contend with the widespread practice of screening calls. The use of caller ID and answering machines has reduced response rates to telephone surveys to extremely (in some cases, unacceptably) low levels. Mail surveys, which rely on consumer panels enjoy response rates comparable to online surveys, but the technology of online surveying enables researchers to craft more complex survey instruments or, as was the case with this survey, to control respondent access to questions. Thus, the order of presentation can be strictly enforced and irrelevant questions can be hidden. With mail surveys, the logical flow of questions is under the control of the respondent. For these reasons, online surveys are quickly becoming the standard against which other methodologies are compared.



- 600 other spa-goers

The total sample desired for each country was 1600 respondents. The actual study samples, however, contained slightly greater numbers of respondents for each quota group and, therefore, for the totals. In any case, the only effect of exceeding the target sample size is a negligible increase in the accuracy of estimates taken from the samples, since any increase in sample theoretically reduces the overall sampling error. The nominal error for a sample of 400 is less than ± 4.9 percentage points at the 95% confidence level. The larger groups of 600 have correspondingly less error; namely, no more than ± 4 percentage points at the same 95% confidence level.

To ensure that sampling consumers with ready access to the Internet does not unduly skew the estimates of spa use, large-scale omnibus surveys administered via telephone in September 2005 were used to determine use of spas by the general population of each country. Each of the two surveys recorded responses from 2000 adults using a random digit dialing method.¹⁴ Respondents to the telephone omnibus surveys were contacted between September 15 and 19, running from Thursday night to Monday night.¹⁵ This coverage eliminates bias caused by restricting contacts to times of the day in which certain classes of individuals, such as full-time employed persons, may be unavailable.

The results of the two omnibus surveys were used to create post-stratification weights for the two corresponding online samples. The weights adjust for age, gender and type of spa used by respondents in the online surveys. Age and gender are the two characteristics most often misrepresented in online surveys, which tend to over-represent females and younger adults, when compared to the general population. These two demographic characteristics were matched to the census figures of each country, and the use of different spa types was adjusted to correct for the quota sampling.¹⁶

Identifying the Spa-Going Population

As the quantitative research focused on spa-goers, the survey had to screen out consumers who are not active users. For the purposes of the study, an active spa-goer is someone who has

¹⁴ The U.S. omnibus survey, conducted by Opinion Research Corporation, contained a national sample of 2063 adult Americans. The Canadian omnibus survey was administered by Maritz Research and contained a national sample of 2001 adult Canadians.

¹⁵ The Canadian omnibus ran longer, until Wednesday, September 21.

¹⁶ In pre-screening for the online survey, individuals who did not visit a spa were not invited to take the survey. The screening also considered the quota sampling plan. Thus, the research samples themselves could not be used to accurately estimate use of the different spa types. Nevertheless, data collected during the screening process indicate the panel used to draw the online samples is as representative of spa use as the omnibus. That is data on spa types used by the online panel appear equal to the omnibus results, within the margin of sampling error.

visited a spa in the past 12 months for more than a manicure or pedicure. Trips to a gym that offers massage, whirlpool and other services are explicitly excluded unless part of a club spa.

Two questions were used to identify spa-goers. The first question asked:

1. In the past 12 months, how many times have you visited the following places?

- Day spa
- Resort/Hotel spa
- Cruise ship spa
- Club spa
- Medical spa
- Destination spa
- Mineral springs spa

A spa-goer had to have made at least one trip to at least one of the seven spa types to qualify. In addition to making a spa visit, we also required study participants to have experienced more than a manicure or pedicure. We asked:

2. At the place(s) you indicated visiting in the past 12 months, which of the following services did you experience?

- Full body massage
- Manicure or pedicure
- Facial
- Body scrub or wrap
- Aromatherapy
- Hydrotherapy treatment
- Mind/Body experiences (e.g., guided meditation, Reiki, Chakra alignment)
- Lifestyle classes (e.g., nutritional counseling, journaling, cooking)
- Movement classes (e.g. yoga, Pilates)

To qualify, the respondent had to indicate at least one treatment other than or in addition to “manicure or pedicure.”

In addition to these qualifying questions, we asked if the respondent had “been to an establishment that offers at least two of the following three kinds of services (e.g., massage + body treatments, skincare + body treatments): massage (full body), skincare treatments (e.g., facials), body treatments (e.g., hydrotherapy or body wraps/scrubs).” Interestingly, about 6% of the qualifying sample indicated that they had not, despite the fact that the establishment described in the question defines a spa. Evidently, a small minority of spa-goers is not fully

aware of what constitutes a spa. A closer look reveals that most of the 6% say they went to a day spa or a resort/hotel spa, which are the two most popular spa types.

Identifying the Spa-Goer Segments

Using a “world” perspective, we can classify spa-goers into one of three different spa-goer segments. These segments represent three different levels of involvement in spa activities, ranging from the least engaged (Periphery segment) to the most committed (Core segment). The remaining spa-goers (Mid-level segment) participate to varying degrees, but show more interest than Periphery spa-goers and less than Core spa-goers.

The method of classifying the segments used a range of attitudinal and behavioral measures, since no single scale of involvement in spa activities can fully represent all of the different facets. In all, the segmentation used responses to seven separate sets of questions as follows:

1. In the past 12 months, how many times have you visited the following places?

- Day spa
- Resort/Hotel spa
- Cruise ship spa
- Club spa
- Medical spa
- Destination spa
- Mineral springs spa

2. At the place(s) you indicated visiting in the past 12 months, which of the following services did you experience?

- Hydrotherapy treatment
- Lifestyle classes (e.g., nutritional counseling, journaling, cooking)

3. Which of these descriptions come to mind as benefits you personally seek or highly value on most of your spa visits?

- | | | |
|----------------------------------|--------------------------|--------------------------|
| • Relaxed | • Escape | • Maintaining appearance |
| • Calm, Quiet or
Peacefulness | • Cleansed or Detoxified | • Physical therapy |
| • Pampering | • Release or Time-out | • Young/youthful |
| • Taking time for me | • Treat | • Cocooning |
| • Refreshed | • Energized | • Rejuvenated or Renewed |
| • Tranquility | • Healing | • Journey |
| • Indulgence | • Fun | |
| | • Relief | |

4. Which of the following reasons have MOST OFTEN motivated you to visit a spa?

- Feel better about myself
- Lose weight
- Improve my appearance
- Overall wellness
- Opportunity to socialize with friends

5. How comfortable do you feel with each of the following aspects of a spa visit (i.e., you know what to expect and what to do)?

- Making an appointment
- Arrival/Checking in
- Selecting treatments
- Asking for assistance
- Discussing treatment options/preferences with therapist
- Undressing/dressing before and after treatment
- Waiting for treatment
- Relaxing after treatment session
- Using complimentary amenities (e.g., sauna)
- Being shown spa products available for purchase
- Paying for services
- Tipping staff
- Expressing concerns regarding your visit

6. Which of the following spa treatments do you feel you have sufficient knowledge about (i.e., enough knowledge that you would know what to expect with the treatment)?

- | | |
|--|---|
| • Aromatherapy | • Massage: Hot stone |
| • Ayurvedic treatment | • Massage: Shiatsu |
| • Body scrub or wrap | • Massage: Standard full-body (Swedish) |
| • Energy work (e.g., Reiki, reflexology) | • Massage: Thai |
| • Facial | • Movement classes (e.g., yoga, Pilates) |
| • Guided meditation | • Lifestyle classes (e.g., nutritional counseling, journaling, cooking) |
| • Hydrotherapy treatment | • Pedicure |
| • Lymph drainage | • Sauna/Steam bath |
| • Manicure | • Vichy Shower |
| • Massage: Deep tissue | • Watsu |

7. What is your opinion of the costs of spa treatments in general?

- Before I tried them, I thought of spa treatments as overpriced luxuries, but now that I've tried some, I think they're well worth the money.
- I can see spending the money on spa treatments occasionally, but they're too expensive for me to purchase regularly.
- Spa treatments are worth the money. You usually get what you pay for.
- Spa treatments tend to be overpriced, usually not worth the money paid.
- The basic spa treatments are worth the money, but the more elaborate treatments seem overpriced.

The questions range from frequency of spa visits to reasons for visiting spas to attitudes towards the pricing of spa visits. While these clearly cover a lot of ground, they all reflect important attitudinal or behavioral aspects of involvement in spa activities. For example, research demonstrates that price is much less of a deterrent to Core spa-goers than to Periphery spa-goers. Core spa-goers are more knowledgeable about and use a wider range of spa treatments, especially those associated less with pampering or indulgence and more with “getting work done.”

To use these different responses, a common factor analysis was performed on individual sets of items. Ten separate factors were constructed from items related to the questions numbered 1, 3, 5 and 6 above. Items under question #1 were reduced to a single factor for the number of spa visits in past 12 months. Items under question #3 resulted in four factors representing the following benefit attributes: peace, work, indulgence and youthfulness. Items under question #5 formed a single factor for level of comfort with spas. Finally, items under question #6 yielded four factors that grouped treatments into: massage therapies, meditation and lifestyle classes, appearance treatments, and more advanced treatments, such as “lymph drainage” and “Vichy shower.”

The remaining questions were used to construct composite measures or to place constraints on the segmentation procedure. For example, the pricing questions were used to distinguish those with price reservations from those without. The latter would be classified as Core spa-goers while those with strong price reservations would be classified as Periphery spa-goers. The items under question #4 were used to reveal Periphery motivations, where a Periphery spa-goer was assumed to be motivated by any of the reasons exclusive of “overall wellness,” which would be a Mid-level or Core spa-goer motive. Finally, the two treatments listed under question #2 indicated Core spa activities.

The ten factors along with the additional composite measures were then used to make assignments to the three spa-goer segments. The general strategy identified Core spa-goers and

Periphery spa-goers only. The remainder makes up the Mid-level spa-goer segment. Core spa-goers are defined as those with above average scores on each of the following factors: frequency of visits, work as a benefit, being comfortable with the spa experience and knowledgeable about the advanced treatments. Periphery spa-goers are defined as those with below average scores on frequency of visits and comfort with the spa experience in addition to indicating periphery motivations, and scoring above average on: either indulgence or youthfulness *and* knowing about either appearance or massage therapies. Finally, as noted above, the pricing information was also used to segment, but this information was used independently. That is, a price sensitive consumer was classified as Periphery and a non-price sensitive consumer was classified as Core.

APPENDIX



Examples of Indirect Sales Through Listening

Examples of Effective Listening

#1

Consumer: Is that an all-natural cleanser, because I only use natural products now?

Therapist: I can understand that you are concerned about what is put on your face. It sounds like you may have had problems with cleansers in the past. What kinds of issues have you had?

Consumer: Well, I have sensitive skin and I've tried just about everything trying to find products that don't make me break-out or burn my skin.

Therapist: Yes, I know it's frustrating trying to find the right product. So you are prone to break-outs?

Consumer: I am, but my skin is also really dry so the acne-prevention products tend to burn. It's like they're too strong or something.

Therapist: You're right, a lot of acne-fighting products contain benzoyl peroxide which would be too strong for your skin. The cleanser I will be using today is not all-natural, but it is non-comedogenic so it won't lead to breakouts. It also has soothing ingredients such as aloe so it is gentle and moisturizing and you'll not have to worry about it burning your skin. Try the tester.

Consumer: Hmm, that smells really good and it's not heavy or sticky.

Therapist: I'm sure it will work for your skin-type even though it is not all-natural.

Consumer: That's fine. Hopefully we'll have success this time.

#2

Consumer: Is that an all natural cleanser, because I only use natural products now?

Therapist: I can understand that you are concerned about what is put on your face. It sounds like you may have had problems with cleansers in the past. What kinds of issues have you had?

Consumer: No, I haven't had problems. I just think natural products are better for me and the environment.

Therapist: I see, so you look for products that are in line with your values of a healthy body and healthy planet?

Consumer: Pretty much.

Therapist: I have a skin-care line that has natural ingredients, is not tested on animals, and the containers are made from recycled materials. Would you like to try this line in today's treatment?

Consumer: Sounds great.



#3

Therapist: How are you feeling today?

Consumer: I'm really stressed.

Therapist: Ouch. This massage should help with all that tension.

Consumer: That's why I'm here (rubbing eyebrows and temples)....

Therapist: It looks like your eyes are bothering you.

Consumer: Yeah, I didn't sleep well and they're a bit sensitive.

Therapist: Here I'll make the room extra dim. When you turn onto your back, I'll also give you a warm lavender-scented eye pillow. It should block the light and the heat and scent will help you relax and soothe your tired eyes. I use my eye-pillow every night before bed so I get an even better sleep.

Consumer: Hmmm, thanks. Maybe I'll have to get one of those.

Therapist: Would it help if I put the name of it down on your after care sheet, in case you want to pick one up for home?

Consumer: Yes, that would be great. Thanks.