Understanding the Canadian Spa Goers

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Introduction

Worldwide, travel for the purpose of health and wellness has seen phenomenal growth in the past decade, with Europe (especially Hungary and Austria), Asia (especially Thailand, Indonesia, India and Japan) but also the United States leading the charge (Mintel International Group Ltd., 2004). In the western world, health has become a major preoccupation of our society, reinforced by an aging baby boomer generation that is determined to be forever young. “The stress associated with consumers’ daily lives has created an increased “need for periodic pampering,” and spas are seen as a means of escaping the pressures and getting re-energized” (Association Resource Centre Inc., 2006: 5). Health is no longer considered just an absence of illness, but rather an optimum state of physical, mental and social well-being that requires a more holistic approach and proactive participation by the individual (Nahrstedt, 2004).

Although “massage is still king”, followed closely by facials, manicures and pedicures (The Hartman Group, 2006), a wide variety of treatments, services and programs are offered by most spas, ranging from hydrotherapy to nutrition, stress management, fitness and counselling. Also, traditional treatments are often integrated with alternative or non-traditional ones from various cultures. In Canada, the spa and wellness industry is a relatively young one that is expanding rapidly. According to PricewaterhouseCoopers (2002) between 1990 and 2001, the number of spa establishments in North America went from 1400 to 10,900, of which 1300 are in Canada, and occupancy went from 40% to an average between 70 and 80%. By 2003, the estimated the number of establishments reached 2,100 in Canada, a 65% growth, with 75% of them being classified as day spas (PricewaterhouseCoopers, 2004).

The spa and wellness industry normally distinguishes between three types of spa-goers, based on the frequency with which they seek out these experiences and their attitude towards them: core spa-goers are knowledgeable about treatments and feel that learning about and going to spas is important to their lifestyle, while periphery spa-goers (at the other extreme) enjoy going to spas but otherwise show little interest in them. Between these two segments is a mid-level spa-goer segment that is interested in learning about spas but lacks the commitment and passion of the core spa-goers (The Hartman Group, 2006: 10). While about half of the spa visits occur during the normal course of the year, 1.8 million Canadians visited a spa while travelling in 2005 (The Hartman Group, 2006: 35). According to Association Resource Centre Inc. (2006: 4), this translates into an estimated 14.1 million visits to Canadian spas, about half of which were taken to spas in Ontario.

A number of studies in recent years have attempted to profile the Canadian spa goer (PricewaterhouseCoopers, 2004; Association Resource Centre Inc., 2006; MedSci Communications & Consulting Co., 2006; The Hartman Group, 2006), but none of these have been able to relate the spa goer to the general population or overnight travellers. However, some interesting behaviours were noted. For instance, according to MedSci Communications & Consulting Co. (2006), two-thirds of referrals to a spa are through word-of-mouth from friends, family and co-workers. 25% Spa goers also use magazine articles and ads to find out about spas. 29% of read or purchased spa-related magazines, and 72% have used the internet, primarily for background research. These spa goers also vacation more than average with 70% taking two or more vacations per year.

The 2006 Travel Attitudes and Motivation Study (TAMS) revealed that during 2004 and 2005, 7.5% or almost 1.9 million of adult Canadians visited a health and wellness spa while on an out-of-town, overnight trip of one or more nights. Futhermore, for almost a third (31%) this was the main reason for taking at least one trip (Lang Research Inc., 2007: 1). However, this study only considered one variable in the survey: “Day visit to a health spa and wellness spa while on a trip of one or more nights". The second variable, “staying at a health spa”, either as part of an overnight trip or as a main purpose, was ignored by this report. Therefore, the incidence rate of those that made a spa or health-related establishment a part of their vacation is considerably higher.

Some of the significant differences between spa visitors and the average Canadian pleasure traveller found by the TAMS study remain consistent with other studies that have attempted to profile the spa goer, including a predominance of women (63.1%, but even higher when considering both variables at 67.4%) that are well educated (42.6% have a university degree; 45.6% when considering both variables) and have a very high household income ($85,105). Furthermore, “spa visitors were extremely active in both outdoor activities and in culture and entertainment activities while on trips. They frequently exercise and jog while on trips and much more likely than the average Canadian Pleasure Traveler to participate in strenuous winter activities (e.g., cross-country skiing and snowshoeing, downhill skiing) and summer sports (e.g., golf, tennis). They also frequently attend live art performances (e.g., live theatre, high arts, comedy clubs and festivals) while traveling and exhibit particular interest in fine cruise (e.g., wine, beer & food tastings, inn or resort with gourmet dining). Spa visitors usually take luxury resort vacations that are relaxing and pampering and that offer novelty, intellectual stimulation and physical challenge” (Lang Research Inc., 2007: 1). Spa visitors are also very inclined to use the Internet to plan (76.8%; 88.6% when considering both variables) and book (53.7%; 67.5% for both variables) travel, and are also among the heaviest users of travel media. They are particularly avid readers of health and wellness magazines and websites, city lifestyle, fashion and beauty magazines, and watch ‘better living’ programming.

While spa visitors clearly constitute a segment when compared with the average Canadian pleasure traveller, the question arises whether there is a difference between the “serious” and the “recreational” spa visitor, i.e., whether respondents made visiting a spa the main reason for their trip or whether they went to a spa as one of many activities while on vacation.

Data and Data Analysis

In this study, the Canadian Travel Activity and Motivation (TAMS) data were used to better understand Canadian (health) spa goers. The samples were restricted to all persons aged 18 years of age and older in the ten Canadian provinces and full-time residents of institutions were excluded. The TAMS study, undertaken by Statistics Canada, used random digit dialing to obtain samples stratified by census metropolitan area (CMA).

The process began with the generation of a random list of 132,065 telephone numbers. Non-travellers and travellers who took an out-of-town trip of one or more nights in the past two years were identified via a screening telephone interview. The mail survey was conducted with those (46,143) who were identified as travellers. A total of 24,692 (53.5%) travelers completed the mail-back survey questionnaires. Statistics Canada reported that, to reduce the sampling errors, the following efforts were made: focus group testing of the questionnaire, a pilot survey test, use of highly skilled interviewers, and data coding and checking verification.

This study data was extracted from the TAMS data. To extract the data, only respondents who had taken an overnight trip in the last two years were considered (84% of respondents). Two activity variables were used: “Day visit to a health spa and wellness spa while on a trip of one or more nights" and “staying at a health spa”. For each variable, it was possible to choose either “On out-of-town trips of one or more nights in past 2 years” or “ Main reason for taking any of these trips”.

Among 24,692 Canadian overnight travellers, 2538 made a day visit and 1,426 stayed at a health spa. Of those, 758 visited a day spa and 511 took a trip to a health spa as the main reason of their travel. Once multiple responses were eliminated, 2990 respondents (12.4% of all overnight travellers) were classified as “recreational spa goers” as they had only visited or stayed at a health spa as one of several activities, and 942 respondents (3.9%) were classified as “serious spa goers” since they had made it their main purpose of the trip.

When weighted to the Canadian population (Statistics Canada, 2006), it was determined that 11.0% or over 2.23 million of Canadian overnight travellers visited a health and wellness spa and/or stayed at a spa resort while on an out-of-town, overnight trip of one or more nights. Furthermore, for almost 34% (almost 800,000) was the main reason for taking at least one trip. This is considerably higher than Lang Research Inc.’s (2007) findings of 7.5% or almost 1.9 million of adult Canadians.

The weighted study data were analyzed using frequency, chi-square and independent t-tests. All results, except where indicated, were significant at the .01 level or better due to the large sample size.

Findings

Perhaps not surprisingly, serious spa goers also frequent day spas when at home much more frequently than recreational spa goers (Table 1). With respect to the socio-demographic characteristics of gender, age, education, income, and marital status or the number of vacation days spent for pleasure trips, there were no truly noteworthy differences between recreational and serious spa goes (Appendix, Table A). Only with respect to the residency of respondents does a clear difference emerge with the largest group of serious spa goes living in Quebec (43.9%), followed by Ontario (25.3%) and British Columbia (14.0%). In both Quebec and Saskatchewan serious spa goes outnumber recreational ones (Table 2).

Table 1. Frequentation of Day Spas by Recreational and Serious Spa Goers

Characteristics	Recreation Spa Goers (%)	Serious Spa Goers (%)	Total
Day Spa			
Frequently	6.9	9.8	7.9
Occasionally	38.4	41.6	39.5
Rarely	35.5	33.9	35.0
Not at all/ not available where I live	19.2	14.7	17.7

Table 2. Residency of the Respondents

Characteristics	Recreation Spa Goers (%)	Serious Spa Goers (%)	Total
Residency			
Ontario	39.0	25.3	34.3
Quebec	23.3	43.9	30.3
British Columbia	16.6	14.0	15.7
Saskatchewan	3.7	7.3	5.0
Alberta	10.3	5.6	8.7
Manitoba	2.7	2.2	2.5
Atlantic Provinces	4.4	1.7	3.5

Serious spa goers can be said to read both daily and weekend newspaper editions more than recreational spa goers, but not the travel sections of these newspapers (Appendix, Table B). The results also indicate a higher participation rate by serious spa goers than their recreational counterparts in reading magazines about fashion & beauty, automobiles & cycles, entertainment & music and food & cooking. Surprisingly, health & living magazines are read more by recreational spa goers. Serious spa goers tend to watch more of most TV programs with the exception of home/garden shows, dramas and music/video shows. They also listen more to radio programs with the exception of country music, modern/alternative rock, and soft/contemporary music (Table 3).

Table 3. Newspaper & Magazine Readership and Preferred TV & Radio Programs

Characteristics	Recreation Spa Goers (%)	Serious Spa Goers (%)	Total
Magazine Readership			
Health & living	33.6	30.5	32.5
Fashion & beauty	33.2	38.2	34.9
Automobiles & cycles	10.2	17.8	12.8
Business	23.4	25.1	24.0
Craft & antiques	14.0	12.6	13.5
Entertainment & music	39.8	42.7	40.8
Family & parents	12.1	11.1	11.8
Food & cooking	34.1	36.5	34.9
Home & garden	32.4	31.0	31.9
News magazines	27.1	29.9	28.1
Outdoor activities	15.9	14.0	15.2

Science & geography	17.0	16.2	16.7
TV Programs			
Comedies	49.2	56.2	51.8
Science/nature	39.7	50.3	43.3
Science fiction/fantasy	14.5	20.4	16.5
Home/garden shows	39.3	33.1	37.2
Late night talk shows	30.2	41.2	34.0
Cooking shows	33.8	40.9	36.2
History	41.0	46.4	42.8
Biography	46.3	45.4	46.0
Dramas	62.3	59.3	61.3
Movies	71.5	73.7	72.2
Music/video shows	25.0	21.8	23.9
News & current affairs	65.4	69.8	66.9
Reality shows	41.1	44.5	42.2
Soap/daytime dramas	24.1	29.5	25.9
Sports/ sports shows	38.6	37.4	38.2
Travel	37.3	43.1	39.3
Radio Programs			
Oldies	32.5	41.0	35.4
Multi-cultural	10.7	16.1	12.6
Classic music	19.8	24.3	21.3
Country music	21.3	17.9	20.1
Jazz	10.2	12.4	11.0
Modern/alternative rock	41.3	39.8	40.8
News/talk/inform	43.1	46.7	44.3
Soft/contemporary music	34.0	28.4	32.1

Although the internet is an extremely important source of information for both recreational and serious spa goers at close to 89%, serious spa goers visit more types of websites with the exception of games, web magazines and shopping. As regards memberships in loyalty programs and clubs of all types, however, the serious spa goer is less likely to belong, especially to flyer programs. This might be deemed contrary to what could be expected given the general frequency of travel by this segment. They are much more likely, however, to engage in community service.

Table 4. Internet Web Visit and Organization Membership

Characteristics	Recreation Spa Goers (%)	Serious Spa Goers (%)	Total
Web site visiting			
Health	51.2	57.6	53.4
Entertainment	54.0	56.5	54.9
Network news site	36.7	40.8	38.1
Games	30.1	24.5	28.2
House & home	35.2	37.0	35.8

Web magazines	18.9	16.9	18.2
Newspaper sites	30.9	29.2	30.3
Shopping	37.7	34.9	36.7
Sports	24.9	22.7	24.1
Travel	67.8	68.6	68.0
Weather	61.4	63.6	62.1
Organizational Membership			
Auto club	43.9	43.6	43.8
Flyer program	43.2	35.5	40.6
Sports club	37.9	37.6	37.8
Hotel/car rental	17.6	16.9	17.4
Community service	12.8	18.0	14.6

Benefits sought showed no noteworthy differences between recreational and serious spa goers except for the desire by serious spa goers to be pampered (Appendix, Table C). The same was true for most destination selection factors (Appendix, Table D). Serious spa goers can be said to attach somewhat less importance to shopping opportunities and budget accommodation, and more importance to direct access by car.

Although spa goers in general use the internet to a significant degree for booking purposes, it is interesting to note that serious spa goers are much less likely to do so for the trip as a whole but more likely as regards their accommodation (Table 5). Overall, the information search behaviour of serious spa goers is less intensive than that of the recreational spa goer (Table 5) with a greater reliance on travel guides. Both rely on websites, particularly from the accommodation sector, for their information.

Table 5. Booking and Information Search Behaviour

Information Source	Recreational Spa Goers	Serious Spa Goers	Overall
Booked/bought trip over Internet	72.3	59.7	68.0
Accommodation	75.3	82.1	77.3
Information sources			
An Internet Website	78.5	78.6	78.5
Advice of friends or relatives/word-of-mouth	61.9	57.7	60.5
Past experience/been there before	57.2	57.9	57.5
A travel agent	51.4	49.9	50.9
Official travel guides or brochures from state / provincial /national organizations	33.2	43.9	36.8
Maps	35.6	36.7	36.0
Articles in newspapers/magazines	29.9	35.5	31.8
An auto club such as the AAA	21.5	22.0	21.7
Travel guide books such as Fodor's or Michelin	20.0	26.5	22.2
Advertisements in newspapers/magazines	20.2	22.1	20.8
A travel planning/booking website (e.g., Expedia, Travelocity)	60.1	49.0	56.4
An airline's website	60.4	50.6	57.1
Accommodation website	66.6	68.2	67.1
DMO website	54.4	53.5	54.1

As has been noted previously, the spa goer has high participation rates in both outdoor and culture/entertainment activities while on trips. However, it is perhaps surprising to see that with few exceptions, the serious spa goer will participate significantly less in activities than the recreational spa goer. Notable exceptions include fresh water fishing, eating at resort gourmet restaurants, staying at lakeside/riverside resorts and private camp grounds (Table 6).

Table 6. Activity Participation by Rank

Variable	Recreational Spa Goers	Serious Spa Goers	Overall
Nature Based Activities			
Sunbathing/sitting on beach	58.2	56.3	57.5
Swimming in lakes	48.5	44.6	47.2
Swimming in ocean	46.7	45.7	46.4
Motor boating	27.1	21.1	25.1
Fresh water fishing	20.5	22.0	21.0
Cycling	17.9	20.2	18.7
Snorkeling in sea/ocean	22.4	20.0	21.6
Kayaking/canoeing/fresh water	18.2	14.5	17.0
Cross country skiing	11.1	13.7	12.0
Downhill skiing	22.5	22.9	22.7
Ice skating	16.8	18.7	17.4
General Recreation Activities			
Hiking –same day	36.1	33.3	35.1
Hiking – overnight	11.8	17.0	13.6
Golfing	26.7	22.6	25.3
Fitness centre	26.0	19.4	23.8
Jogging/exercising outdoor	27.2	18.3	24.2
Mini-golf	20.3	17.7	19.4
Horseback riding	10.5	7.6	9.6
Golf resort	9.5	7.2	8.7
Park Activities			
Nature park	41.5	37.9	40.3
Wildflowers/flora viewing	17.5	18.2	17.7
Wildlife bird watching	15.6	15.2	15.4
Marine life viewing	20.1	17.8	19.3
Wildlife land based animals	22.6	21.1	22.1
Aboriginal Activities			
Heritage museum	14.1	12.3	13.5
Arts & crafts shows	10.2	9.3	9.9
Festivals	5.7	3.8	5.0
Cuisines	7.9	3.2	6.3
Dining			
Dining at restaurant offering locally produced Food menu	78.7	70.2	75.8
Outdoor cafe	66.9	61.4	65.1
Fine dining with other high-end restaurants	48.8	47.8	48.5
Fine dining with international reputation	37.1	34.6	36.2
Wineries (day visit)	32.0	29.6	31.2
Fruit picking	17.9	19.9	18.6
Food & drink festival	10.2	14.3	11.6
Resort gourmet restaurant	11.0	20.8	14.4
Breweries (day visit)	12.1	13.4	12.6
Cooking/wine courses	10.5	9.9	10.3

Dining at a farm	8.2	7.2	7.9
Attractions			
Sightseeing – Historical buildings & architecture	61.8	52.3	58.6
Well known historical sites	46.0	42.0	44.7
Well-known natural wonders	41.0	30.8	37.6
Casino	38.9	37.0	38.3
Art galleries	33.9	35.4	34.4
Resort			
Lakeside/riverside resort	41.6	54.0	45.8
Seaside resort	39.0	40.5	39.5
Private camp ground	22.0	26.8	23.6
Ski or mountain resort	30.4	26.1	28.9
Remote lodge accessible by car	10.0	11.9	10.6
Shopping or Browse			
Clothing, shoe & jewelley	76.8	69.3	74.3
Local art & crafts	57.5	53.8	56.2
Music & book store	61.7	55.1	59.5
Antiques	38.3	33.4	36.7
Greenhouse/garden centre	27.5	24.8	26.6
Gourmet foods retail stores	32.7	33.0	32.8

Implications

It is clear that the spa goer in general is a very profitable segment to understand and target, and that there is merit in determining the extent to which health and wellness is only a component of a vacation trip or the main purpose as there are some important differences. Overall, it appears that the serious spa goer is more difficult to reach through traditional means. Extremely well educated and informed, spa goers in general appear to rely on a great variety of sources in all types of media.

However, it is also clear that it is important to determine what constitutes the "spa segment" and that a narrow definition like that used by Lang Research Inc. provides a different profile from that when considering a broader definition. Thus, great caution needs to be exercised by businesses and destinations that wish to use any segmentation reports, even those released by government organizations, as the methodology used to determine the segmentation base may not conform to the specific needs or understanding of third parties.

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Appendix

Table A. Socio-Demographic Characteristics of the Respondents

Characteristics	Recreation Spa Goers (%)	Serious Spa Goers (%)	Total
Gender			
Male	38.9	40.3	39.4
Female	61.1	59.7	60.6
Age			
18-24	9.3	6.9	8.5
25-34	22.2	22.6	22.3
35-44	23.0	25.2	23.8
45-54	24.0	24.5	24.2
55-64	13.3	12.9	13.2
65 and over	8.1	7.9	8.0
Education			
Less than high school	6.4	5.2	6.0
High school diploma	20.0	17.7	19.2
Some post secondary	7.9	12.8	9.5
College diploma	23.7	24.5	24.0
Bachelor's degree	42.0	39.9	41.2
Income			
Less than 20K	3.4	3.5	3.5
20K – 39,999	11.5	11.9	11.6
40K – 59,999	15.3	14.5	15.0
60K – 79,999	17.1	15.1	16.4
80K – 99.999	13.4	19.0	15.3
100K or more	39.2	36.0	38.2
Spousal status			
With spouse/partner	89.4	90.8	89.1
Vacation Days spent for pleasure trips			
0-4 days	16.2	21.3	18.1
5 – 9 days	21.9	21.5	21.7
10 – 14 days	29.8	29.5	29.7
15 – 19 days	15.4	14.4	15.0
20 or more days	16.7	13.4	15.5
Children in household (12 years or less)	17.7	21.2	18.9

Table B. Newspaper & Magazine Readership and Preferred TV & Radio Programs

Characteristics	Recreation Spa Goers (%)	Serious Spa Goers (%)	Total
Newspaper Readership (daily)	87.0	91.5	88.5
Newspaper Readership (weekend)	87.8	91.5	89.1
Weekday Ed. Newspaper Readership (Travel section)			
Frequently	27.3	27.7	27.5
Occasionally	38.1	34.3	36.8
Rarely	24.4	25.3	24.7
Never	10.1	12.7	11.0
Weekend Ed. Newspaper Readership (Travel section)			
Frequently	36.2	33.5	35.2
Occasionally	33.8	32.6	33.4
Rarely	20.6	23.8	21.7
Never	9.5	10.1	9.7

Table C. Benefits sought

Benefits Sought	Recreation Spa Goers	Serious Spa Goers
Learning		
To see or do something new & different	2.53	2.46
To gain knowledge of history, other cultures or other places	1.66	1.66
To enrich your perspective on life	2.25	2.19
To stimulate your mind/be intellectually challenged ...	2.03	1.95
Relaxation		
To relax and relieve stress	2.73	2.75
To get a break from your day-to-day environment	2.70	2.72
To have a life with no fixed schedule	2.42	2.43
Self Esteem		
To have stories to share back at home or something interesting to talk about	1.72	1.72
To be challenged physically/ to feel physically energized	1.91	1.95
To create lasting memories	2.53	2.53
To be pampered	1.90	2.04
Family/Social Bonding		
To keep family ties alive	2.24	2.26
To renew personal connections with people	1.95	1.89
To enrich your relationship with your spouse/partner/children	2.48	2.55

Note: Benefit sought items were anchored by 1 is Of no importance and 3 is Highly important.
statistically not significant

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Table D. Destination Selection Factor

Factor	Recreation Spa Goers	Serious Spa Goers
Safety and Security		
No health concern at the destination[B]	2.42	2.43
Safety	2.62	2.59
Familiarity		
Familiar with culture and language	1.70	1.75
Being at a place that is very different culturally	1.77	1.77
Destination having friends or relatives	1.40	1.32
Destination Attributes		
Lots of things to see & do -children	1.53	1.60
Lots of things to see & do - Adults	2.34	2.37
Availability of information on the Internet	2.06	2.03
Shopping opportunities	1.72	1.60
Accommodation		
Luxury accommodation	1.64	1.63
Mid-range accommodation	2.24	2.26
Budget accommodation	1.88	1.77
Availability of low package deal		
Direct access by air	2.20	2.15
Direct access by car	2.24	2.33

Overall destination choice anchored by 1 is Extremely important and 5 is not at all important completely agree.
B –Destination Choice items were anchored by 1 is Of no importance and 3 is Highly important.