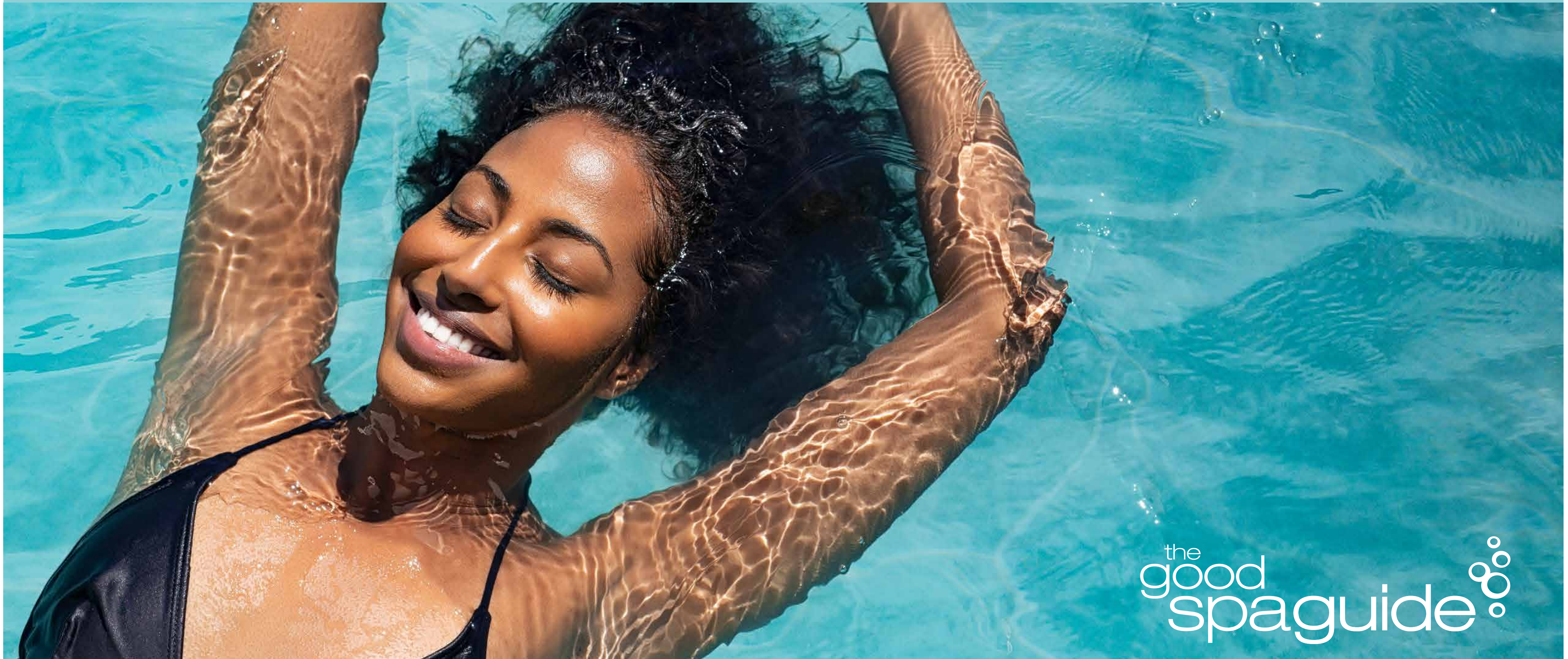


CV-19 SPA REPORT: JUNE 2020



the
good
spaguide 

WELCOME

Helping the public feel confident returning to spas is going to be a grand challenge for our industry in the coming months, some people will be excited to return as soon as they are able, others will be looking for a few months reassurance before they decide to dip their toes in the spa waters. Thankfully very few people (less than 2%) have told us that they will not return to spas for the foreseeable future. Nearly 5,000 spa goers completed our survey, telling us their views on what they're looking forward to, what they are worried about and what they think their spa habits will be going forward. Broadly it's good news, 80% of people have said they will return to spas straight away or in a couple of months, 80% expect to spend about the same amount that they spent on spas before the CV crisis. There are still some questions about hygiene standards and limiting the amount of spa guests, but the picture is positive.

We hope this survey will help you, and the industry as a whole, make key decisions about how to successfully re-open your spa in the coming months. This is an industry that is built on care and support, and hundreds of people have told us just how much they value their spa time. I know the Spa Spies will be there to shout about all the creative and innovative ways spas can help us going forwards.

We wish you the best of luck during your re-opening phase.

All at Good Spa Guide.

THE HIGHLIGHTS

80%

WILL GO BACK TO A SPA NOW OR SOON

98%

ARE HAPPY TO HAVE THEIR TEMPERATURE CHECKED

68%

ARE LOOKING FOR LONGER 2-3 DAY RETREATS

65%

JUST WANT TO RELAX IN A SPA ENVIRONMENT

80%

EXPECT TO SPEND THE SAME ON THEIR SPA TIME

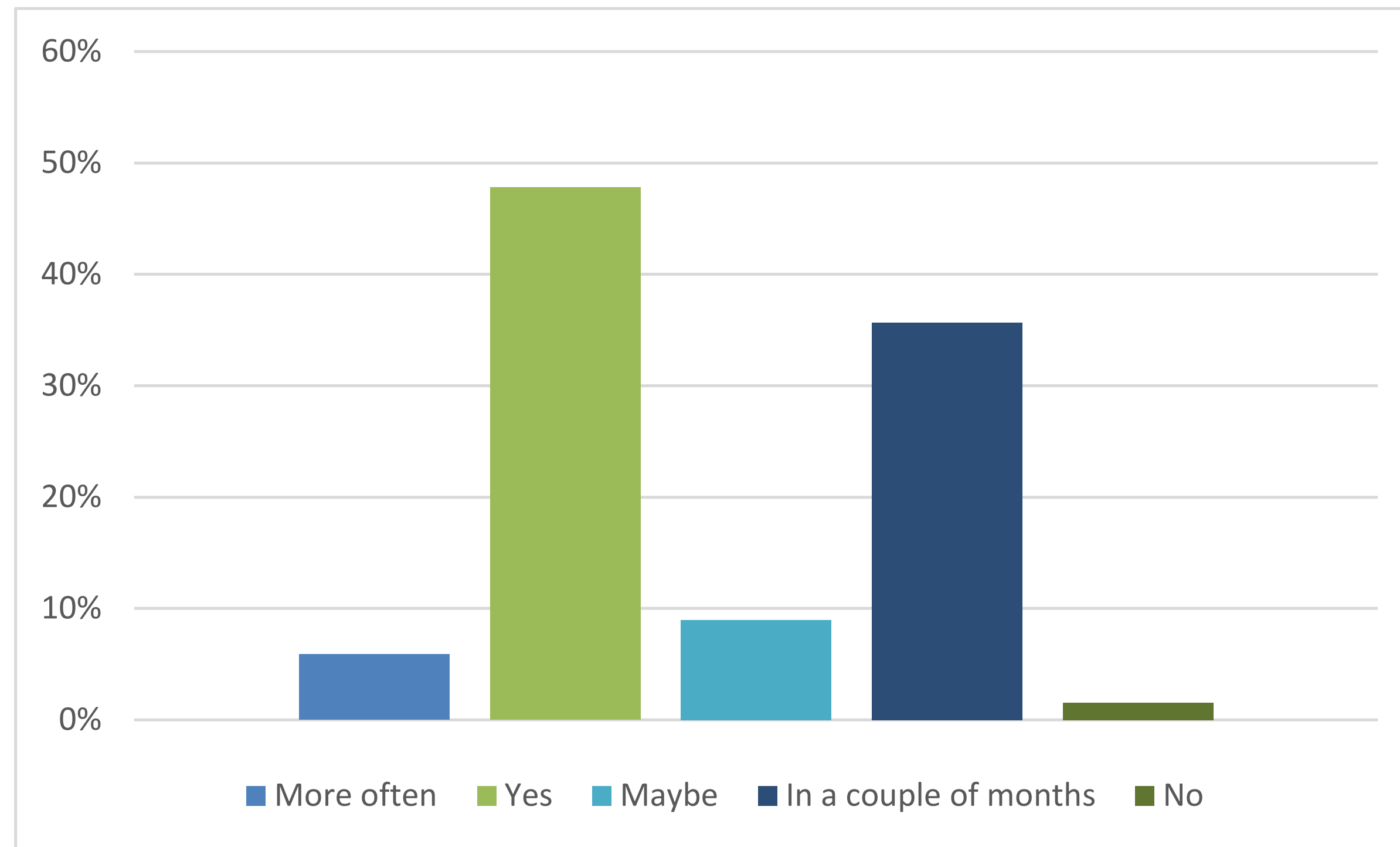
60%

WOULD BE HAPPY TO HAVE MASSAGE WHEN SPAS REOPEN

IN ASSOCIATION WITH THE
UK SPA ASSOCIATION

WILL YOU RETURN TO SPA?

WILL YOU BE HAPPY TO VISIT A SPA WHEN THEY OPEN AGAIN?



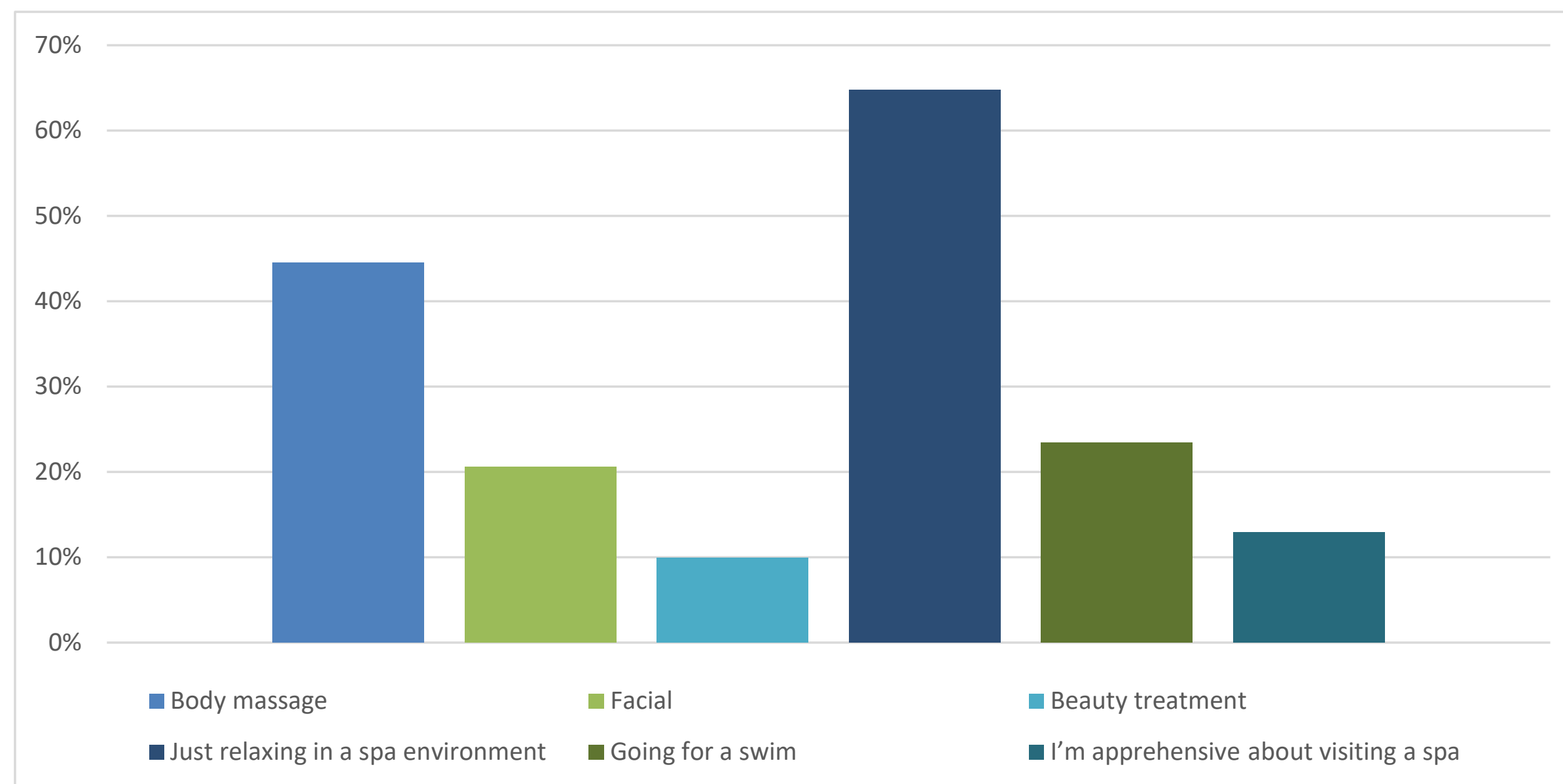
More than 80% of people said that they will go back to a spa straight away (48%) or in a couple of months (36%). A further 9% said maybe and only 2% said no. There is a small group (6%) of people who said they will go to a spa more regularly than they did before the CV crisis. Men are the group that are most certain they will return to spas straight away with 51% agreeing. The 46-60 age group are also confident with 50% of people saying they will return as soon as they able. The youngest age group (18-30) were slightly less confident but only by 2%.

The 61+ age group are most likely to say that they will return, but in a few months, (44% compared to 41% who would return straight away). The younger age group (18-30) has the highest proportion of people saying they will spa more often, with 10% agreeing.

There is little regional variation to the question with all regional cohorts having a majority of people saying they would return straight away. In Scotland and Wales zero respondents told us they would not return to spas. East Anglia had the highest return rate with 56% of people saying they would return straight away. The South East of England had the lowest with 43% saying they would return straight away.

PRIORITIES WHEN RETURNING

WHAT ARE YOU MOST LOOKING FORWARD TO WHEN SPAS REOPEN?



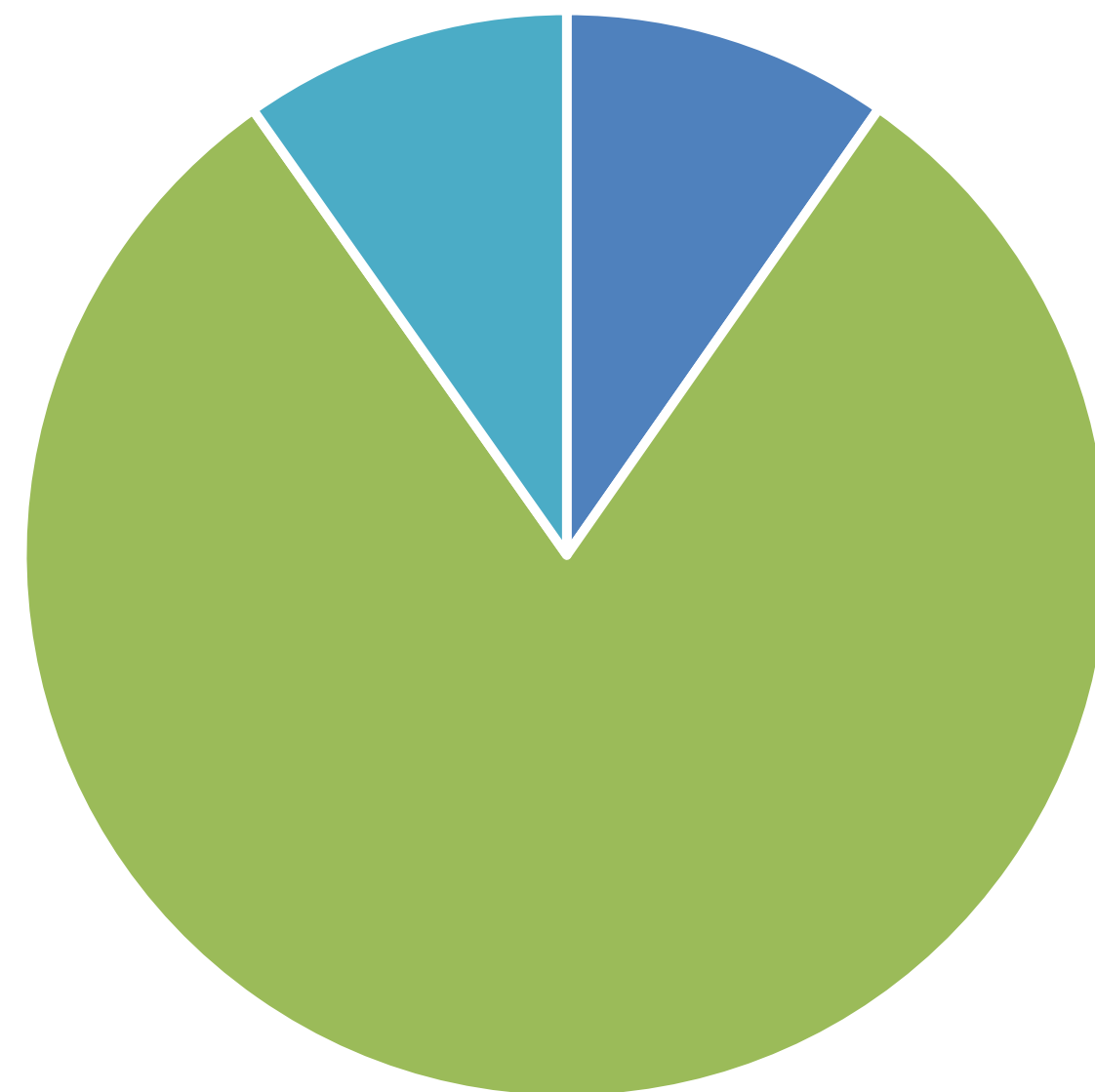
With 65% of people saying they just want the opportunity to relax in a spa environment, the responses paint the picture of just how difficult people have found the CV crisis. A massage was second on the list of what people want to experience from a spa with 45% telling us this is their top priority, facials (21%) and beauty treatments (10%) are on the list, too. Just over 20% told us they most wanted to go for a swim and 13% told us they were apprehensive about going to a spa.

Across the board most people are looking forward to the spa environment and having a massage. The 61+ age group are more apprehensive (2% more than average), most likely to want to swim (3% more than average) and are less likely to want a massage (6% less than average). The 18-39 group are most looking forward to a massage (6% more than average). The 31-45 age group are most looking forward to relaxing in a spa environment (up 4% on average).

Men are most likely to just want to relax (4% higher than women) and they are 2% higher than women in wanting a massage. Women are looking for a broader range of treatments including a facial and beauty treats.

SPENDING

DO YOU EXPECT TO SPEND LESS, THE SAME OR MORE THAN YOU DID BEFORE?



■ I will spend less ■ I will spend about the same ■ I will spend more

A reassuring 80% of people are expecting to spend the same amount of money on their spa time as before the CV crisis, 10% expect to spend more and 10% expect to spend less.

The core spa market, age 46-60, are most confident with 83% saying they expect to spend the same, 8% saying they will spend less and 9% saying they will spend more. The 18-30 bracket is more diverse with 74% saying they expect to spend the same but 15% saying they expect to spend less. Men are most likely to spend more with 13% of respondents agreeing.

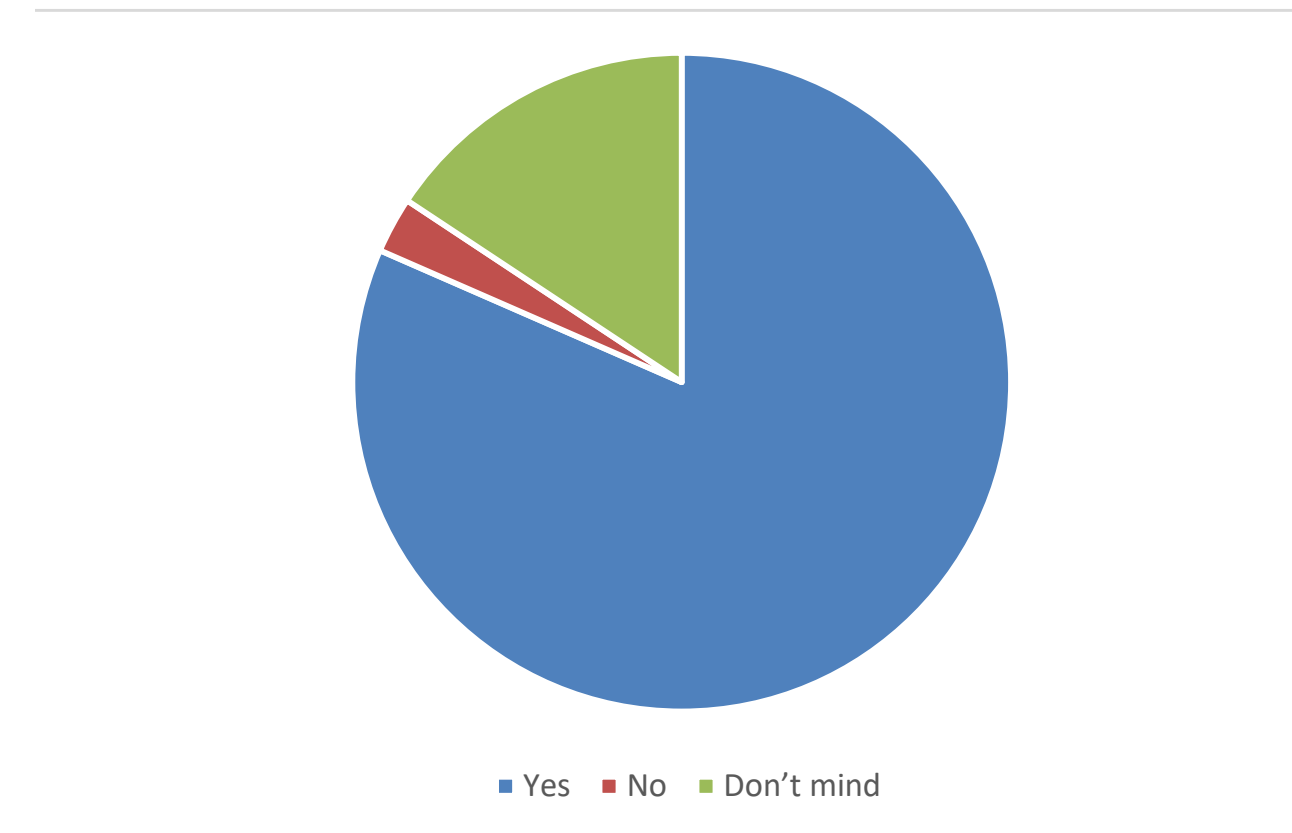
There is a small amount of regional variation on this with the North West (13%) and Scotland (20%) expecting to spend more and the West Midlands being the area where most people (12%) said they would spend less.

ARRIVAL



1 WOULD YOU OBJECT TO HAVING YOUR TEMPERATURE TAKEN ON ARRIVAL?

The vast majority, 98% of people, said they are happy to have their temperature checked on arrival, only 2% said this would make them uncomfortable. A few respondents told us that in their individual circumstances, for example during the menopause, their temperature might not be a good reflection of their health and wanted to make sure they would not be penalised because of this. Several people also suggested that they would expect to be able to re-book their spa day at no cost if they were barred entry because of a high temperature.



2 WOULD YOU LIKE TO BE INFORMED ABOUT A SPA'S HYGIENE POLICY PRIOR TO ARRIVAL?

Most people (82%) said they would like to be informed of a spa's CV and hygiene policy before their visit, 3% said they didn't need this information and 15% said they don't mind. In the comments, many people felt strongly that they would need transparency about what a spa is doing around CV before their visit, this includes a policy for guests and staff. There were also some concerns about how spas would enforce their policy with many respondents saying they were more worried about the behaviour of other guests rather than the spa policies.

GUEST CONCERNS

Spa goers key concerns fall into four areas; hygiene, testing, keeping spa policies transparent and limiting the number of people using the spa facilities.

Hygiene, understandably, is the highest cause of concern with many people suggesting that they would like the ability to regularly wash their own hands and to make sure their therapists did the same. There were also suggestions that there should be a permanent cleaner in each spa area including the changing rooms so people can see what is being cleaned when. Others suggested there should be hand sanitiser by each set of doors and handwashing stations in the thermal facilities.

Some suggested they would expect the bed covers to be changed on treatment beds and loungers between uses, others suggested that pool side loungers should be allocated to guests. Some suggested they would be more comfortable using their own robes and towels. Most people mentioned they were worried about cleanliness in the thermal facilities and the changing rooms.

Many people expected that staff should be regularly **tested for CV** or have their temperature checked and would be willing to do so themselves. Many people were nervous for therapists and wanted to make sure therapists were protected and happy to work.

Most people wanted to know the spas hygiene and CV policy before they arrived and said it was **very important that spas were absolutely transparent** around things like whether guests or staff were unwell. Some went so far as to suggest that spas could have a system which let people know if anyone got unwell after visiting.

Most people said that they would want spas to **limit numbers of guests** so they could still enjoy their time in the spa. If spas were to close some facilities or people were not allowed into some facilities, they would expect this to be reflected in the price.

Some smaller suggestions included numbering hooks in wet areas, so people didn't choose the wrong robe and using foot pedal bins across the spa facilities instead of hand operated ones. Respondents suggested using tools instead of hands during treatments. Several people asked if they could hire a spa with a group of family or friends, so they know all the other people in the spa and would feel more comfortable.

While most people were happy to follow whatever guidance a spa gives, some said they felt spas need to strike a balance of not having too many rules or they might find it too difficult to relax, they emphasised that they wanted spas to retain the caring and nurturing environment and not feel too clinical.

1

HYGIENE

many people suggesting that they would like the ability to regularly wash their own hands and to make sure their therapists did the same

2

TESTING

Many people expected that staff should be regularly tested for CV or at least have their temperature checked.

3

TRANSPARENCY

Most people wanted to know the spas hygiene and CV policy before they arrived

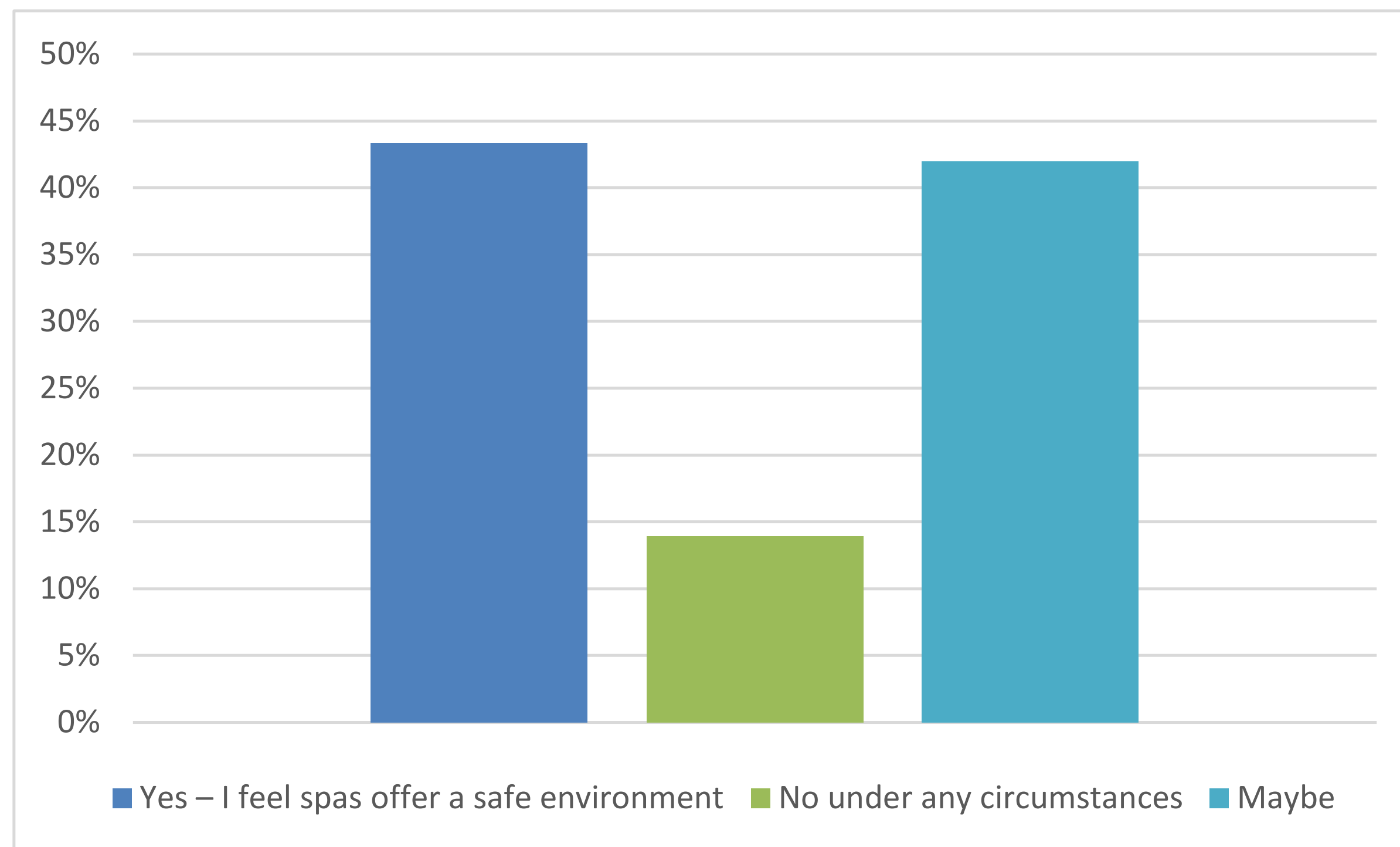
4

LIMITED NUMBERS

Most people said that they would want spas to limit numbers of people so they could still enjoy their time in the spa.

THERMAL FACILITIES

WOULD YOU BE HAPPY TO USE INDOOR THERMAL FACILITIES (WITH SOCIAL DISTANCING IN PLACE) ONCE SPAS RE-OPEN?



Facilities were a crunch point for many respondents, with questions around whether the heat of thermal facilities might make catching the virus more likely. Just under 44% of people said they felt happy to use thermal facilities, saying they felt spas offered a safe environment. Just over 42% said they may use the thermal facilities and just 14% of people said they wouldn't.

Men were most happy to use the thermal facilities with 50% saying they would. The older age range (61+) were least happy at just 37% and in the middle range (46-60), 43% said they would and 14% said they would not.

People in Northern England were most likely to use thermal facilities with 48% saying they were comfortable to use steam rooms and saunas. The South West was least likely with just 37% saying they would use heat facilities. East Anglians were most likely to say no (20%).

POOLS

WOULD YOU BE HAPPY TO USE A CHLORINATED POOL AND/OR HOT TUB (WITH SOCIAL DISTANCING) ONCE SPAS RE-OPEN?

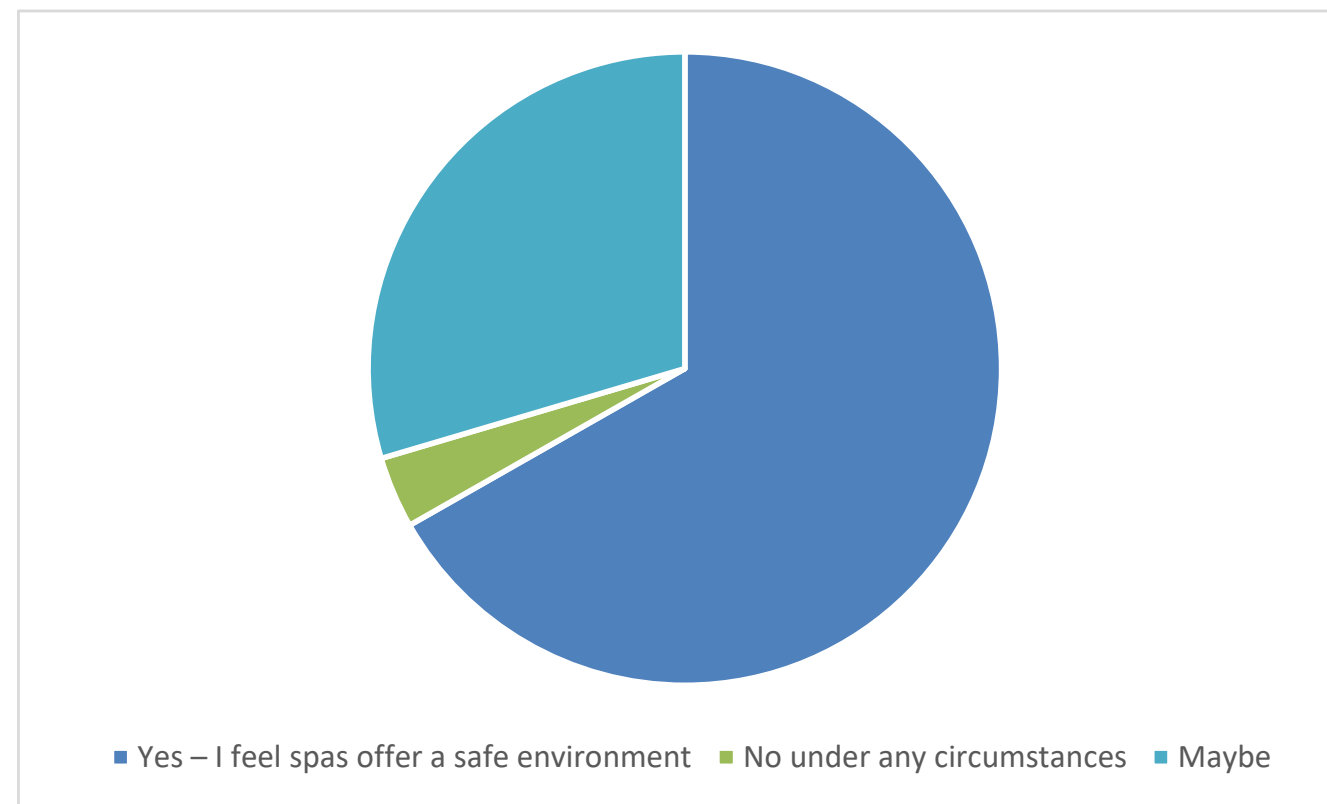


Just under two thirds (61%) said they would be happy to use treated pools, 33% said they might use wet facilities and just 5% said they would not be happy to use pools.

The youngest demographics (18-30) were most likely to say yes (72%) and the 61+ demographic were the least likely (63%). In the gender split, 6% of men said they would not use pools compared to 3.5% of women.

The North West were the highest regional group to say they would use pools (72%) and no one in Scotland said they would not use treated pools.

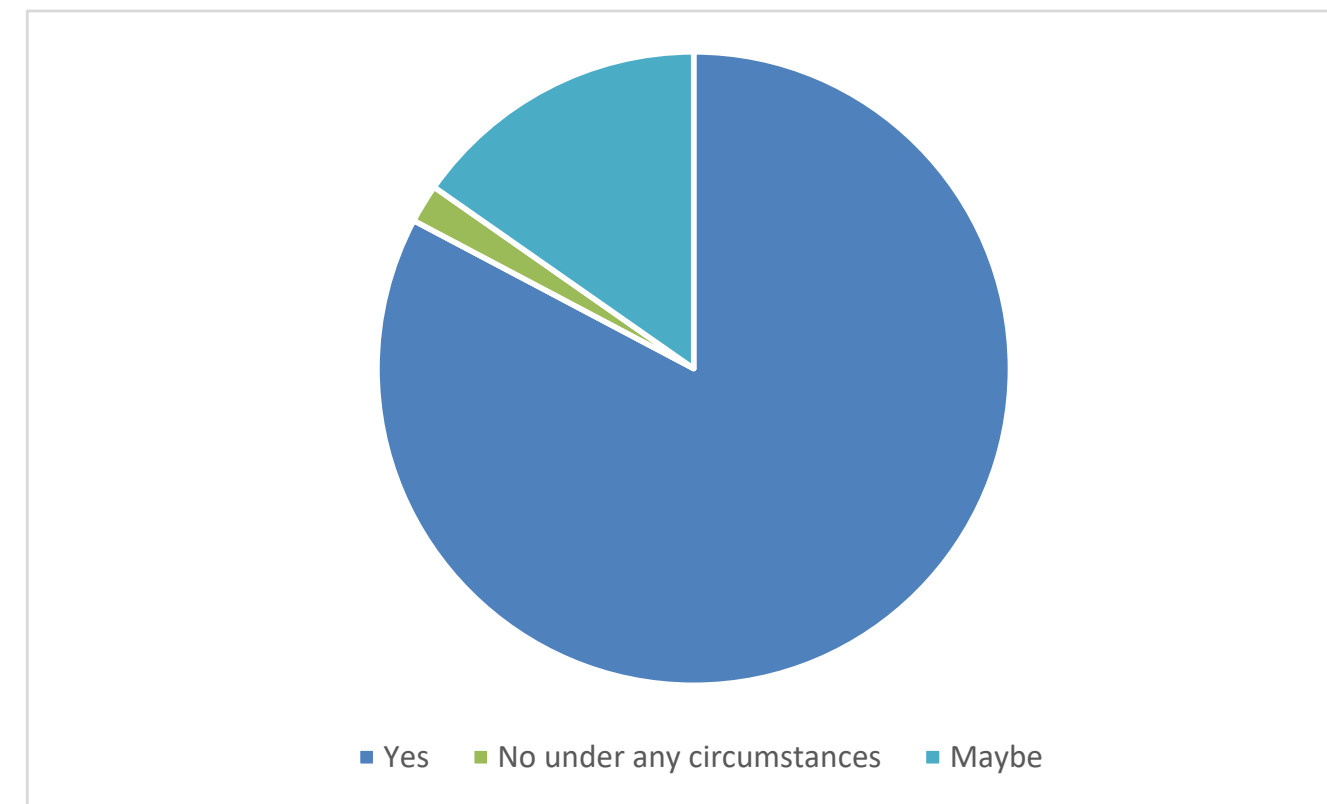
DRY FACILITIES



1 WOULD YOU BE HAPPY TO USE A RELAXATION ROOM (WITH SD)?

Over two-thirds of people (67%) said they would be happy to use a relaxation room. Just under a third (29%) said they might use a relaxation room and 4% said they would not.

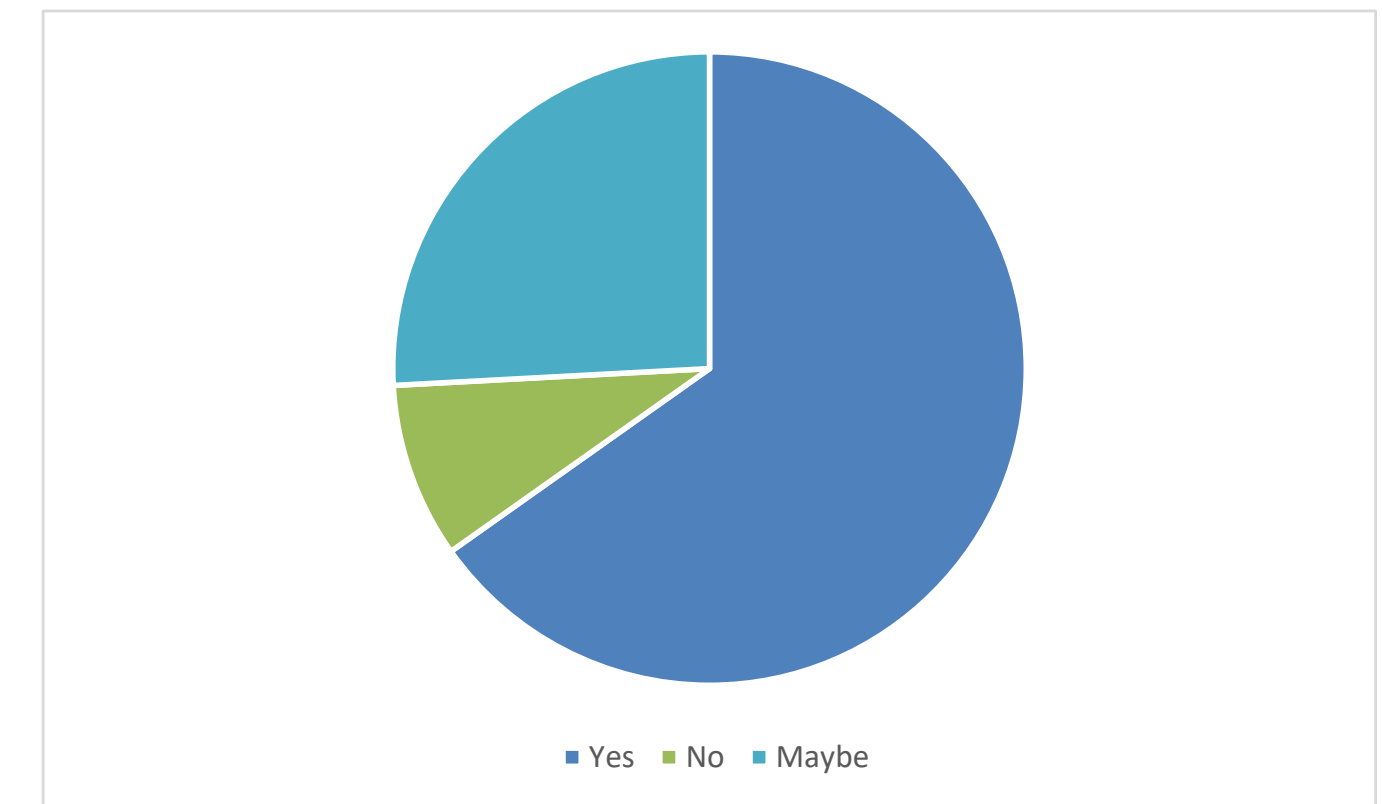
The youngest age group were the happiest to use a relaxation room (72%) and the 61+ age group least likely (64%). Men were 2% less likely to use a relaxation room than women. The North West is most likely to use the relaxation room with 72% of people saying they would feel comfortable. No one in Scotland or Wales said they would not use a relaxation room.



2 WOULD YOU BE HAPPY TO VISIT A SPA RESTAURANT (WITH SOCIAL DISTANCING)?

Potential guests were confident about using a spa restaurant with social distancing measures in place, 83% of people said they would be comfortable eating at a spa. Just over 15% of people said they might be happy and just under 2% of people said they would not be comfortable.

The levels were high across the board with 85% of 18-30s being the highest and 82% of 61+ being the lowest. The genders agree with 82% of both saying they would happily eat in a spa restaurant. Southern England is most likely to eat in a spa restaurant (87%) and Scotland the least (67%).

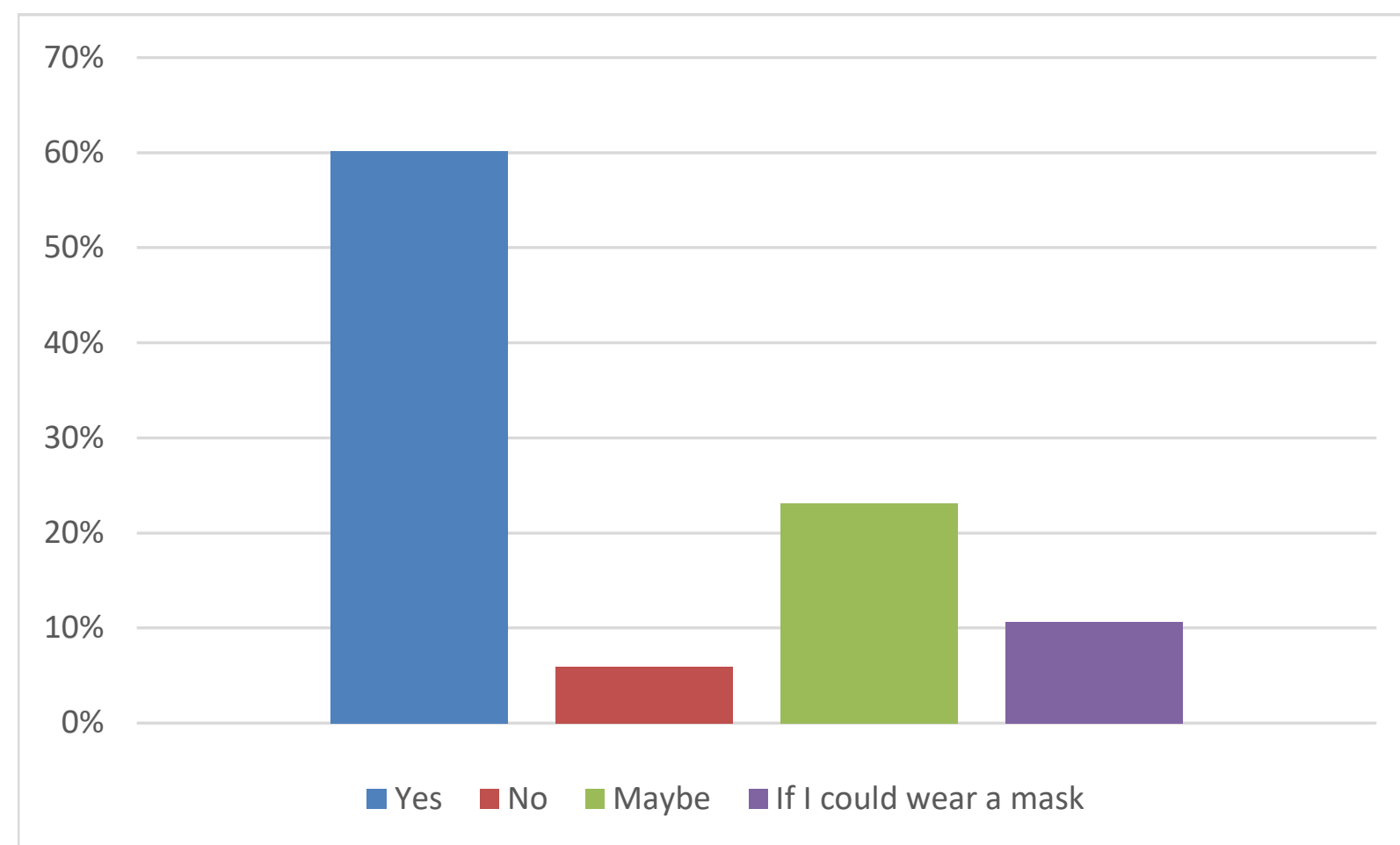


3 WOULD YOU FEEL HAPPIER USING OUTDOOR FACILITIES THAN INDOOR ONES (WITH SD)?

Nearly two thirds (65%) of people told us they would be happier using outdoor facilities. Just over 26% of people said they may feel happier and 9% of people said they would not.

The 31-45 age group were most likely to be happier outside (69%) and the 61+ group were the least likely (58%). Men were most likely to say they would not be happier with 12% of responses. The South West and East had the highest positive responses with 69% of respondents. In Scotland only 38% of respondents agreed.

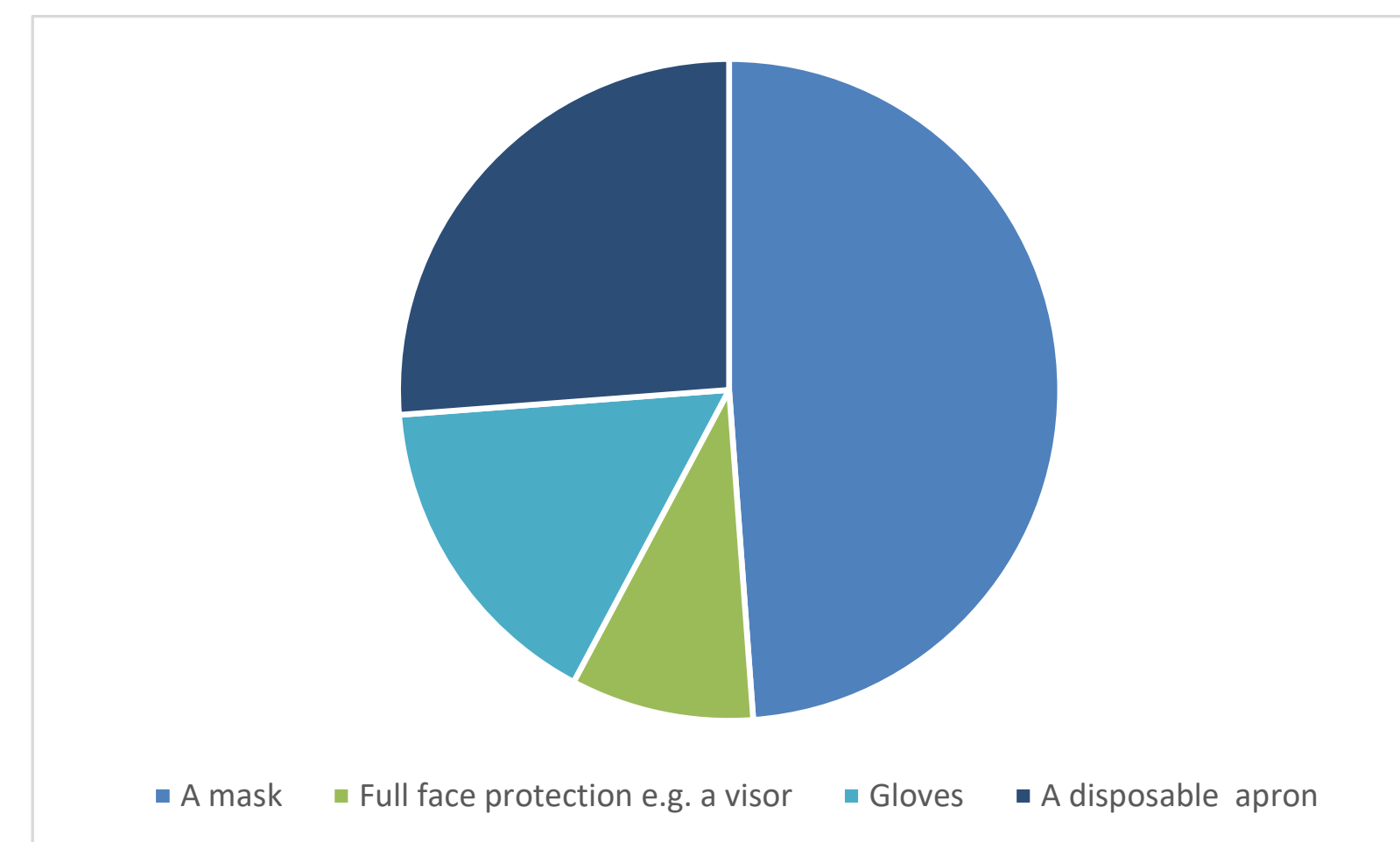
BODY TREATMENTS



1 WOULD YOU FEEL HAPPY HAVING A BODY TREATMENT WHEN SPAS REOPEN?

Positively, 60% of people said they would be comfortable having a massage when spas reopen, 23% said they might and 6% said they would not. Just over 11% said they would be happy if they could wear a mask.

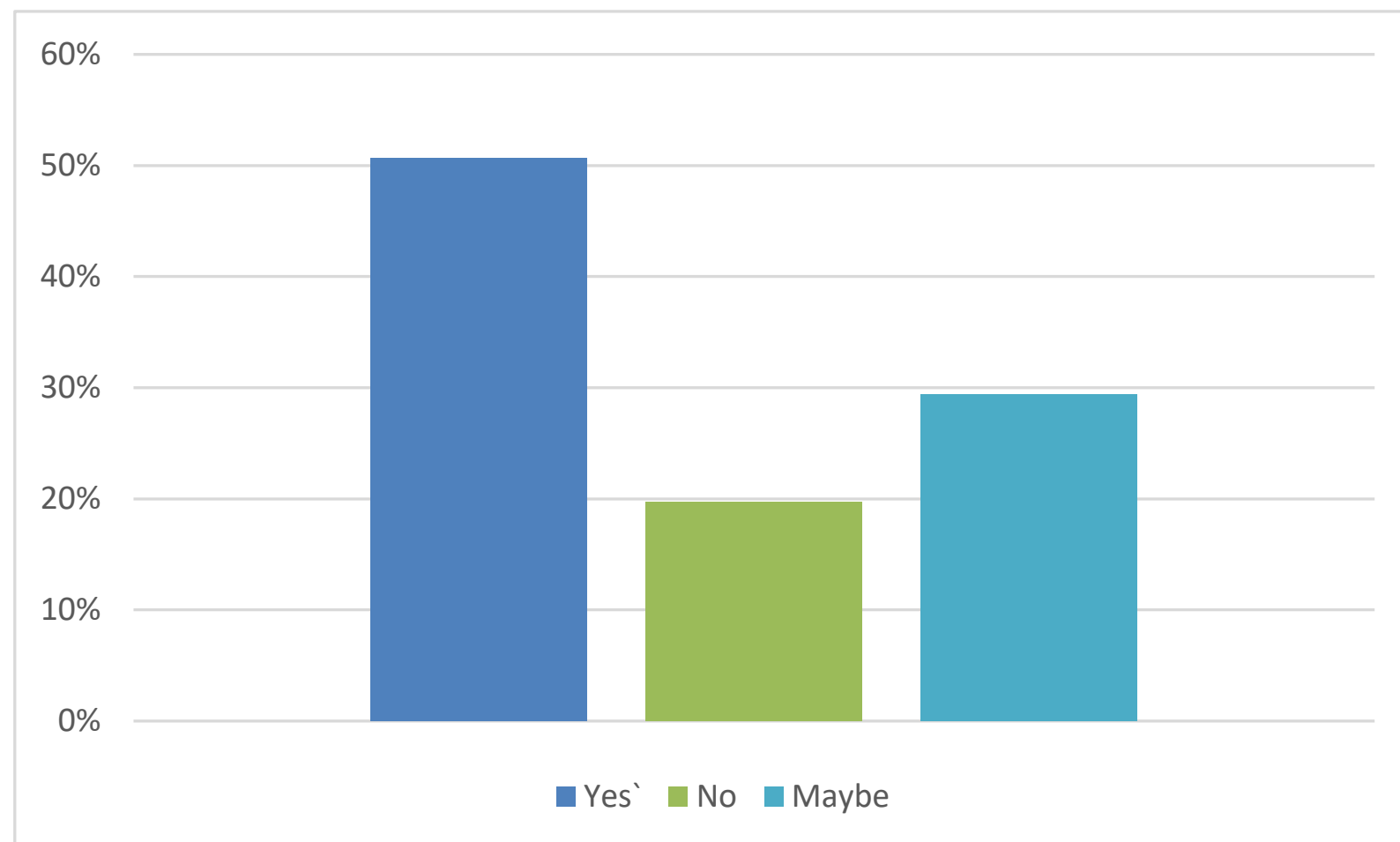
In the 18-30 group, 64% of people said they would have a massage, 63% of 31-45s agreed, but a lower 54% of the 61+s said they would have a body treatment. The 61+ group were most likely to wear a mask (11%). Over two-thirds (67%) of men said they would have a massage but were least likely to wear a mask (5%).



2 WHAT PPE WOULD YOU EXPECT A THERAPIST TO BE WEARING?

In a multiple choice question, 81% of people said they felt their therapist should be wearing a mask, 43% expected a therapist should wear a disposable apron, 26% said they should wear gloves and 15% they should wear full face protection such as a visor.

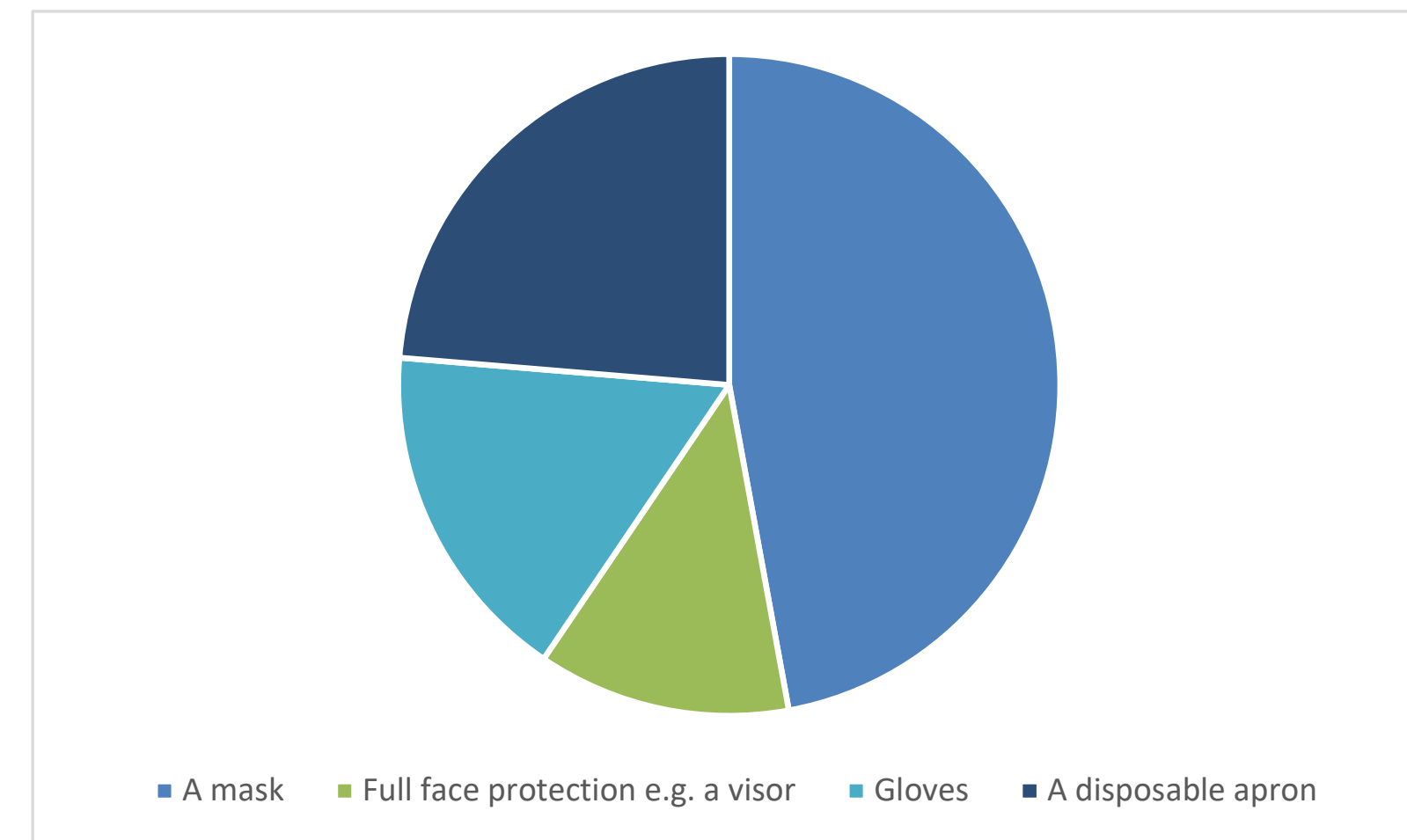
FACIALS + EYE TREATMENTS



1 WOULD YOU FEEL HAPPY HAVING A FACIAL OR EYE TREATMENT WHEN SPAS REOPEN?

Just over 50% of people said they would be happy to have a facial or eye treatment when spas re-open, 10% less than people who are happy to have a body treatment. Just under a third, 29% of people, said they might have a facial or eye treatment and 20% said they would not.

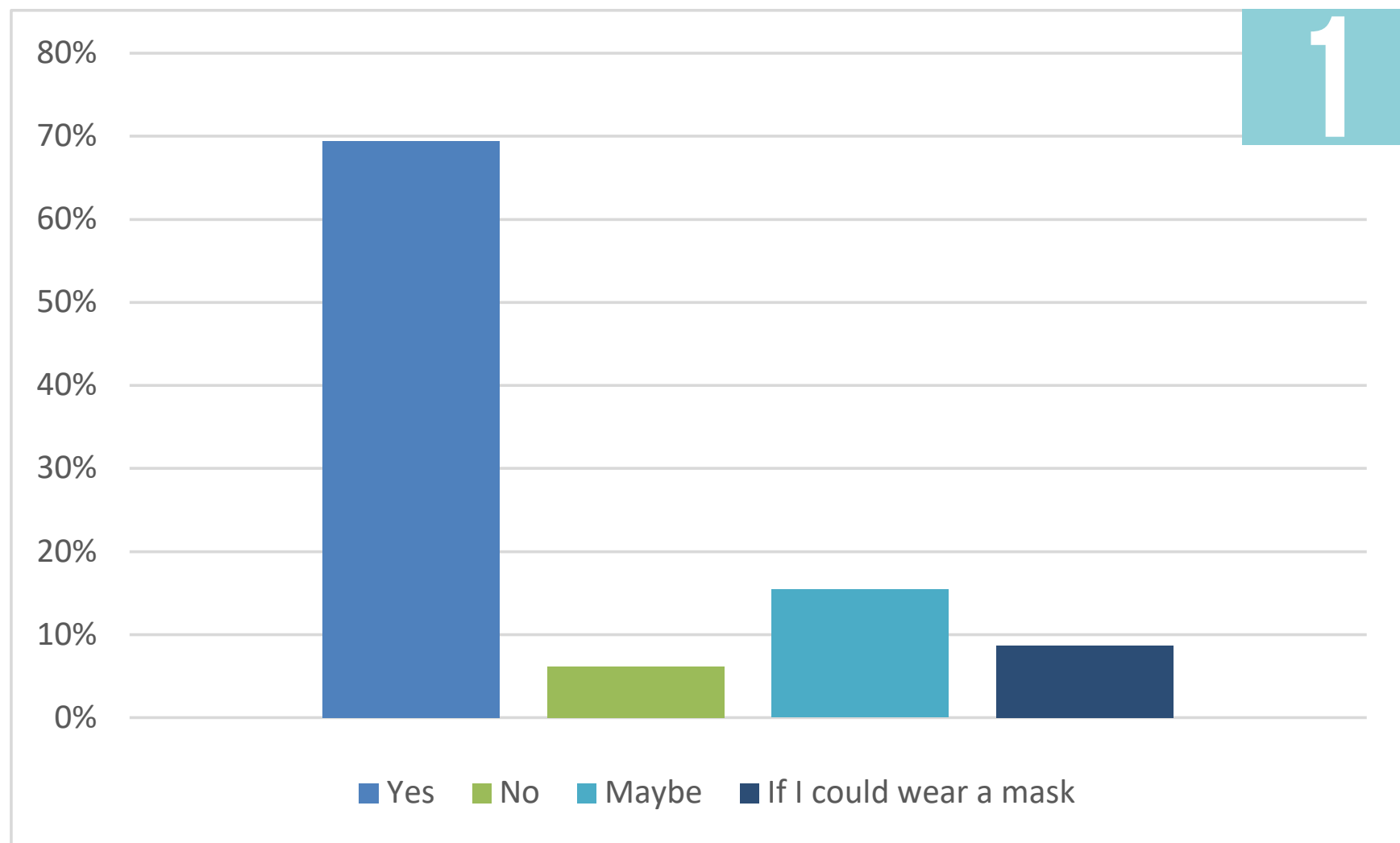
The 61+ age range was least likely to have facial (46%), the 18-30 group was most likely (92%). Respondents in Northern England and the North West were most likely to have a facial (57%) with Wales the least (32%).



2 WHAT PPE WOULD YOU EXPECT A THERAPIST TO BE WEARING?

In terms of PPE, 81% of people would expect their therapist to be wearing a mask, 41% would expect a disposable apron, 29% would expect gloves and 21% would expect full face protection such as a visor.

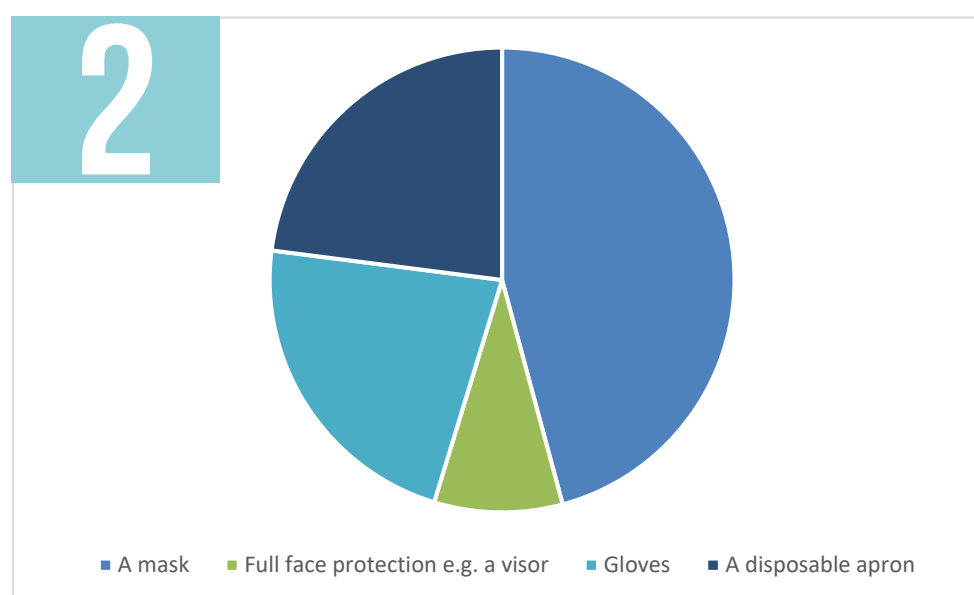
BEAUTY TREATMENTS



WOULD YOU FEEL HAPPY HAVING A BEAUTY TREATMENT SUCH AS A MANICURE OR PEDICURE WHEN SPAS REOPEN?

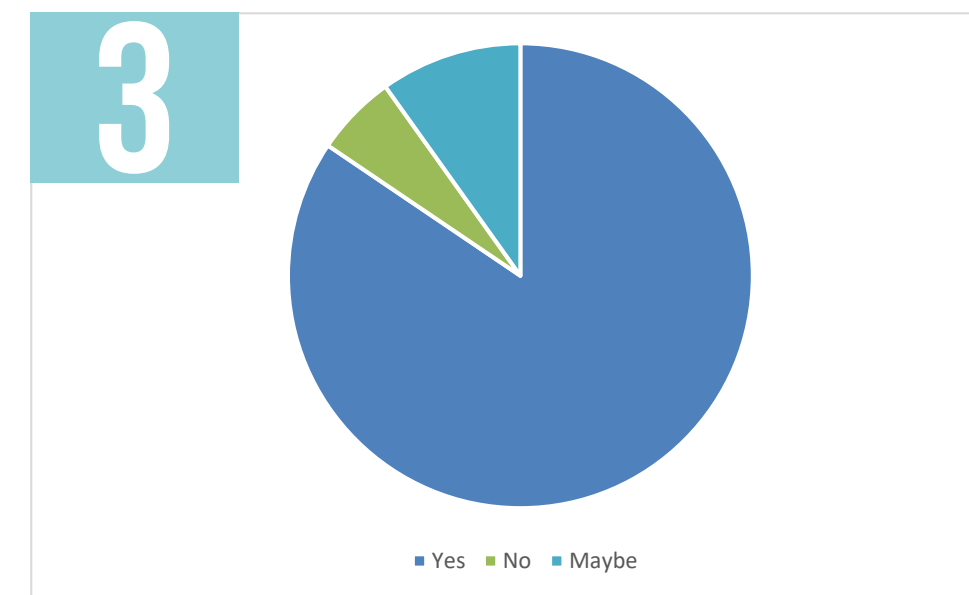
Respondents were most happy having a beauty treatment such as a manicure or pedicure with 69% of people saying they would have one when spas reopened. Just over 15% said they might be happy, 6% said they would not be happy and 9% said they would be happy if they could wear a mask.

The 18-30 group were most happy with 74% of respondents agreeing. Only 5% of women said they would not be happy compared to 55% of men (although this discrepancy may reflect treatment choices pre-CV). The South West, Southern England, East Midland and East Anglia regions were all most likely to wear a mask at 10%+. Only 48% of people in Scotland said they would have a beauty treatment, 24% said no and 24% said they might.



WHAT PPE WOULD YOU EXPECT A THERAPIST TO BE WEARING?

For PPE, 83% of people would expect their therapist to be wearing a mask, 42% would expect a disposable apron, 40% would expect gloves and 16% would expect full face protection such as a visor.

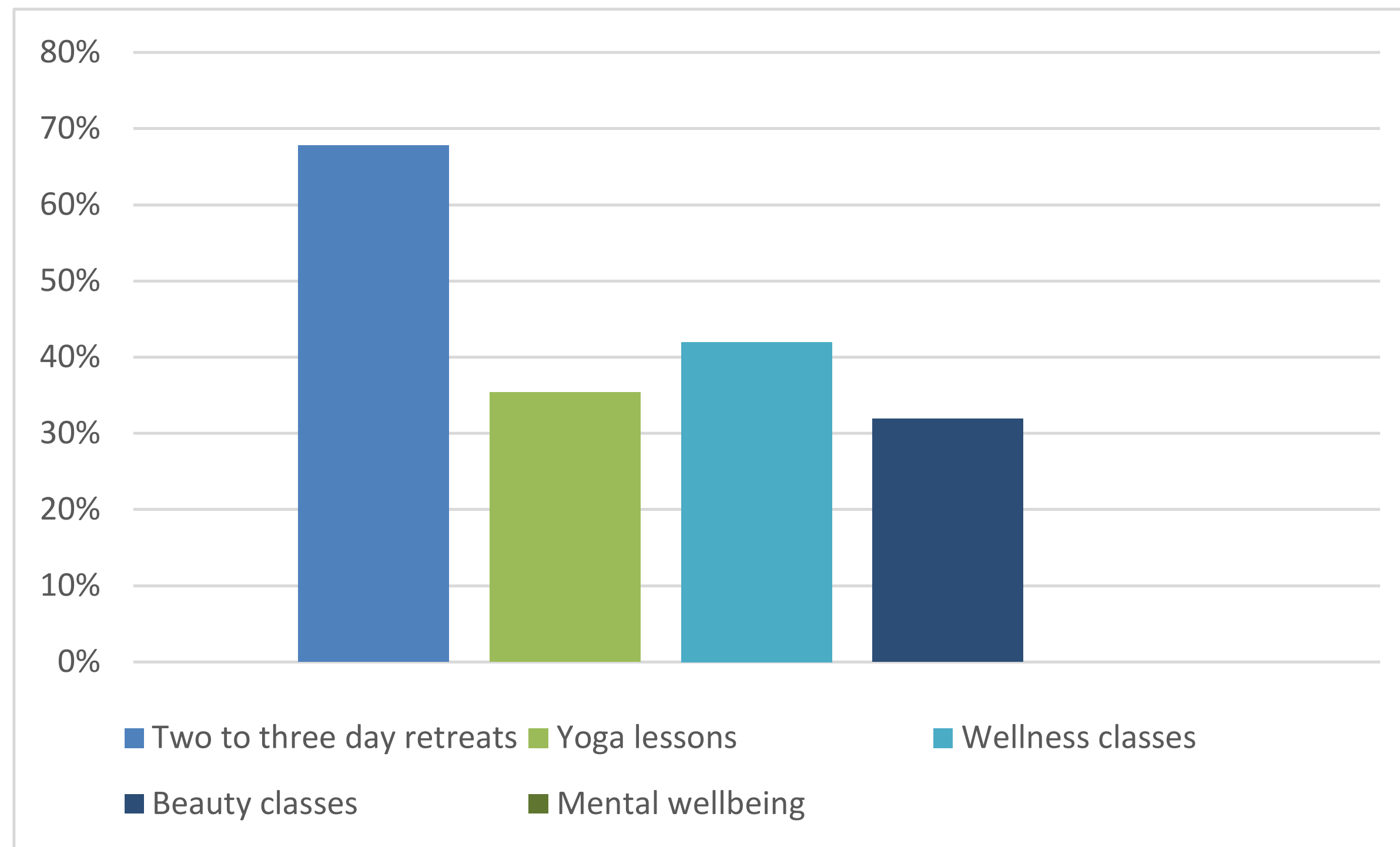


WOULD YOU BE HAPPY TO SIT OPPOSITE YOUR THERAPIST DIVIDED BY A CLEAR SCREEN?

Across the board, 84% of people said they would be willing to sit with a clear divider between therapist and client while having a beauty treatment, 10% said they might and 6% said they would not.

THE SPA OFFERING

ARE THERE ANY OTHER EXPERIENCES THAT YOU WOULD YOU LIKE TO BE OFFERED AT A SPA?



In a multiple-choice question, most people (68%) were interested in longer 2-3 day stays with a focus on wellness including sleep retreats and nutrition advice. Classes were also interesting to respondents with 42% interested in wellness classes, 35% interested in yoga classes and 32% interested in beauty classes. Interestingly, no respondents said they would want mental wellbeing sessions, despite mental health being part of the agenda around CV. Fewer people responded to this question, only two thirds of people (71%) said they would be interested in new or different offerings from spas.

Other options that respondents suggested include online classes or follow ups, Tai Chi, skincare classes and talks, outdoor treatments more fitness classes, sleep retreats and even 'connection classes' so we can re-connect after the period of lockdown.

GOOD SPA GUIDE

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We award the unique and trusted spa Bubble Rating™ to all our spa partners and host the annual UK Good Spa Awards, the highlight of the spa industry calendar.

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We look forward to hearing from you!

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*Google Analytics January – December 2019

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