

Can a luxury hotel compete without a spa facility? Opinions from senior managers of London's luxury hotels

É possível que um hotel de luxo tenha competitividade, sem um spa? Opiniões de gerentes de hotéis de luxo de Londres

¿Es posible que un hotel de lujo tenga la competitividad sin un spa? Impresiones de gestores de hoteles de lujo de Londres

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Abstract

The development of the wellness facility within the luxury hotel sector around the world has been evident, with many professionals believing that spas are an expected element within luxury hotels. This paper has been written to provide further consideration for hoteliers who are looking to open a luxury hotel within the city of London, to add to the body of knowledge on spas and to stimulate further research in the field. The literature revealed a lack of realistic insight by hotel professionals. Statistics are quite broad and look more at other markets than directly at hotels in the city of London. By interviewing five senior managers of London's best known luxury hotels, the importance the spa plays to the hotel, its overall purpose of being in operation, personal managerial opinions on the facility and the overall economic benefit for the hotel are explored. The findings uncover some of the current positive and negative issues in the London luxury hotel spa sector. There turned out to be ambiguity among the interviewees about the definition of a hotel spa and the amenities it should offer. It was concluded that a luxury hotel will be at a severe disadvantage if it has no wellness facilities. What those facilities must consist of, however, is not clearly defined. Further research is needed to look from the consumer's point of view when defining the value of a hotel spa. It would benefit both the hotels and their guests to have more understanding of what actually is expected from the spa experience.

Keywords: Hotel Spas. Guest Satisfaction. Spa Expectations. Wellness Centres.

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Resumo

O desenvolvimento das facilidades relacionadas ao bem estar no segmento de hotéis de luxo, em todo o mundo, tem sido evidente, com muitos profissionais apostando que os spas sejam um dos equipamentos obrigatórios nos hotéis de luxo. Este artigo foi escrito com o objetivo de fornecer informações mais consistentes a hoteleiros que estejam interessados em abrir um hotel de luxo na cidade de Londres, para ampliar o conhecimento sobre spas e para estimular pesquisas futuras sobre o assunto. A literatura mostrou que os profissionais hoteleiros não têm uma visão realista sobre o assunto. As estatísticas são muito genéricas e costumam dedicar-se mais atentamente a outros mercados e não diretamente aos hotéis localizados na cidade de Londres. O artigo foi escrito a partir de entrevistas realizadas com cinco gestores dos mais conhecidos hotéis de luxo de Londres. Nessas entrevistas, foram colhidas as opiniões dos gestores sobre a importância do spa para o hotel, o objetivo geral de mantê-los em operação, opiniões sobre a gestão dos espaços e o benefício geral que a facilidade traz para o hotel, em termos econômicos. Os resultados expõem algumas questões positivas e outras negativas relacionadas aos spas em operação nos hotéis de luxo de Londres. Mostraram haver ambiguidade entre os entrevistados, no que diz respeito à própria definição de um spa hoteleiro e sobre os serviços que ele deve oferecer. As conclusões foram que um hotel de luxo estará em grande desvantagem se não dispuser de facilidades relacionadas ao bem estar. No entanto, não há uma definição clara sobre quais devem ser essas facilidades. É necessário que haja mais pesquisas que considerem o ponto de vista do consumidor, a fim de que se possa definir o valor de um spa, no contexto hoteleiro. Seria um benefício tanto para os hotéis quanto para os seus hóspedes, se houvesse mais entendimento sobre o que realmente se espera de uma experiência em um spa.

Palavras chave: Spas Hoteleiros. Satisfação do Cliente. Expectativas sobre Spas. Centros de Bem Estar.

Resumen

El desarrollo de instalaciones relacionadas con el bienestar en el segmento de hoteles de lujo, en todo el mundo, ha sido evidente, con muchos profesionales que creen que los spas son uno de los equipamientos más requeridos en hoteles de lujo. Este artículo fue escrito con el objetivo de proporcionar información más consistente a los hoteleros que están interesados en la apertura de un hotel de lujo en la ciudad de Londres, para aumentar el conocimiento sobre los spas y para estimular futuras investigaciones sobre el tema. La literatura mostró que los hoteleros profesionales no tienen una visión realista sobre el tema. Las estadísticas son muy generales y tienden a centrarse más en otros mercados y no directamente a los hoteles situados en la ciudad de Londres. El artículo fue escrito a partir de entrevistas realizadas con cinco directores de los hoteles de lujo más conocidos de Londres. En esas entrevistas, fueron recogidas opiniones sobre la importancia del spa para el hotel, el objetivo general del hotel para mantenerlos en funcionamiento, los puntos de vista sobre la gestión de los espacios y el beneficio general que la instalación lleva al hotel, en términos económicos. Los resultados

exponen algunas cuestiones positivas y otras negativas relacionadas con los spas en funcionamiento en los hoteles de lujo de Londres. Mostraron que hay cierta ambigüedad entre los gestores, con respecto a la definición misma de lo que sea un spa hotelero y de los servicios que debe proporcionar. Las conclusiones fueron que un hotel de lujo estará en grave desventaja si no disponer de servicios de bienestar. Sin embargo, no existe una definición clara de lo que deberían ser esas instalaciones. Es necesario que haya más investigación para considerar el punto de vista del consumidor, para que se pueda establecer el valor de un spa en el contexto hotelero. Sería un beneficio para los hoteles e incluso para sus clientes, si hubiera más entendimiento sobre lo que realmente esperar de una experiencia en un spa.

Palabras clave: Spas Hoteleros. Satisfacción del cliente. Expectativas sobre Spas. Centros de Bienestar.

Introduction

The world of luxury hotels has been apparent within societies for centuries and could historically be seen as an expected element for upper class society. The developments over the past decades have, however, allowed many people to experience what only the rich and famous once could. Expectations have risen and as a result, competition is high in the hotel industry. A change in expectations also means a change in guests behaviours and opinions. The traditional terms associated with luxury hotels were to provide a “pampered” experience, however now that is seen to be changing, with spa visitors wanting to feel “entertained, excited and inspired” from their stay (BARSKY, 2009, p. 11). Luxury hotels therefore must adapt to meet the guests wants and wishes. The city of London is world famous for its Luxury Hotel Market, with a lot of this recognition being tendered by the rich historical history associated with each establishment as well as the many famous celebrities and aristocrats who have visited the hotels. The competition for finding a suitable hotel location that accommodates the adequate facilities to meet with guest's demands and expectations within London is increasing (THIESON, 2012).

A luxury hotel is more than just quality accommodation, and contemporary establishments facilities play a pivotal role in creating a hotel identity, business success,

generation of revenue and providing value to the guests overall experience (STIPANAK, ROFFMAN, 1992; JONES, JOWETT, 1998). It is believed what separates a luxury hotel from the customary is its focus and commitment to the amenities and facilities they offer and their products and services (MCDONOUGH, 2001). The provision of spa facilities in Luxury Hotels in London, however, has never been so common as in current times. The movement through time has seen spas becoming deemed an essential element in hotel success and is now an expected commodity within luxury hotels (DONILCAR, OTTER, 2003; MANDELBAUM, LERNER, 2008). The 1980's saw a dramatic period of change within the luxury hotel segment, whereby the concept of spas was marketed and introduced to hoteliers to produce a competitive advantage within a crowded market place (TABACCHI, 2008). The introduction of the spa concept coincided with the hotel market growth, in particular with that of hotel chains that offered their services to a diversity of markets (SLATTERY, 2012). Hotels quickly became aware of the need for these facilities, with renovations and additions of spa areas notable across many world renowned hotels (ELLIS, 2008).

Thirty years since their introduction to the luxury hotel sector, spas are now a common feature in luxury hotels. In the past, spas were predominantly treated and managed as revenue departments, similarly to that of food and beverage operations. Their whole purpose within a hotel was and still is to enhance the ability of increasing hotel occupancy and provide additional sales and marketing opportunities (THORNSTEINSDOTTIR, 2005; DUSSEAU, BRENNAN, 2008; O'FALLON, RUTHERFORD, 2011). Huge investment is devoted by hotel companies in creating sophisticated relaxation and health areas (SPA, 2007). With competition high and the ever need to adapt to the changing consumer trends of both the global hotel and spa industries (ELLIS, 2008), re-investment is hinted to be a necessity in order to maintain competing in the market place.

Despite the continuous investment, luxury hotel spas rarely provide hotel owners with the same amount of financial return as other departments in a hotel (WALDTHAUSEN, HODRAI, STURMAN, 2014). This is probably because of the

notoriously high overheads associated with running spa facilities on a continual basis, as well as the inadequacy of thinking through a well organised and operational spa concept (GIBSON, 2008). For a hotelier thinking of developing a luxury hotel establishment within the London market, it is essential that evidence is provided to make suitable decisions that give benefit to consumers and in return provide economic value to the hotel. This paper is written to identify the value of a hotel spa facility from the perspective of senior managers of London's Luxury Hotels, to help uncover both the economic benefit and the opinions senior managers have on the addition of the spa facility to their hotel to help provide the most beneficial information to hoteliers. The aim of this investigation is to identify the value of a spa facility to the Luxury Hotels of London in order to better highlight the positive and negative attributes of having a spa facility within a luxury hotel. This will then help to identify whether or not a luxury hotel within the city of London can compete without having a spa in the present market.

Literature review

According to the Global Wellness Institute (2014, p. 5), a hotel spa is a facility located within a hotel, "providing spa services on an à la carte basis to hotel guests and outside/local guests". Services and treatments are likely to complement a hotel guest's stay and Crebbin-Bailey (2005, p. 201) describes a hotel spa to be "an oasis of tranquillity and peace" providing "relaxation and escape from a busy schedule for the discerning traveller". The integration of the wellness sector into the global spa industry has meant a considerable amount of effort is also placed on health, fitness and wellness components. Many professionals believe that the core structure of any spa is devoted to the promotion of wellness (DUSSEAU, BRENNAN, 2008; SRI, 2008). Hotel spas are usually larger in size than everyday day spas and frequently look to feature fitness facilities in order to equate for the growing health trend in which consumers look for fitness and wellness amenities within their travels (MINTON, 2002; JOHANSSON, 2004).

Topaz Leisure Consulting (2006) and Smith and Puczko (2009) showcase how the increasing amounts of hotel spas have begun to offer their products and services to compete directly with leisure operators to help generate revenue through memberships in the local markets. Some hotel spas put a lot of emphasis on beauty treatments even though it is argued that “beauty” aspects are not foreseen to be a part of the spa industry officially (MINTON, 2002; TABBACHI, 2008). With the different services and products on offer, for a luxury hotel it is essential that brand standards are maintained. As such, a well thought out spa concept and design is pivotal for the success of luxury hotels, and many of them look to third party management for their spas operations (GIBSON, 2008). The spa industry as a whole has gone through a dramatic period of growth throughout the world. In Europe, there are an estimated 25,000+ spa establishments in operation generate an annual turnover of nearly 20 billion (MINTEL, 2011). According to Spa Creator (2012) approximately 41 per cent of the UK spa market is in hotel/resort spas. The city of London in particular has seen continued development of hotel spa facilities, mostly due to international hotel spa chains being implemented into many of the leading luxury hotel brands to capture this growing global market (MINTEL, 2011).

The emphasis upon an own brand spa and wellness concept is believed to assist in defining a hotels philosophy and brand recognition and can quickly help develop the ability to identify the business' characteristics, target markets and directions of intent (STIPANAK, ROFFMAN, 1992; SCHWEDER 2008; TANDY 2011). Hotels spas can increase hotel revenue both in internal and external markets (FOSTER, WOHLBERT, 2006; MADANOGLU, BREZINA, 2008; BOWDEN 2009). Monteson and Singer (1992, p. 37) suggest that well-managed spas “can and should be profit centres” in their own right, regardless of the fact that their whole purpose is to help increase occupancy rates and drive average daily room rates. Znaidi, Khazmi and Abdellatif (2014) discovered that the addition of a spa and leisure facility can help justify the pricing structures of luxury hotels. Questions do remain however about why not all hotel brands have adopted this philosophy into their core business structure. The encompassment of the spa concept is seen to help push a hotel into the luxury categorisation (TNS 2005;

MINTEL 2011). This can, however, be disputed with many non-luxury marketed hotels also adopting these services into their hotels.

The nature of a spa adapting its service to the individual guest is seen as a key element in promoting a positive guest experience, through the use of sensitive approaches, argued by some to be missing in other areas of a hotel (LO, WU, TSAI, 2015). The spa industry as a whole at present is going through a lot of developments. Trends such as healthy hotels, nutrition and fitness are all high upon the global spa customers agenda (SpaFinder, 2014), presenting the hotel spas of London with a large selection of marketing opportunities and potential revenue generation streams. On the contrary, it is documented that many spa and wellness departments within hotels are under-performing against other departments (WALDTHAUSEN, HODRAI, STURMAN, 2014). Hotel spas have difficulty in meeting guest expectations and due to the nature of the competitive market, cannot generate profit because of the high overheads associated with the operations. As a result, this is the likely reason why it is challenging for hotel spas in London to establish themselves within the spa market (WHITTLE, 2012). Despite these problems, spas are still being deemed an essential element in hotel success of today and are now an expected competency within luxury hotels.

The concept of spa as a whole is seen to reflect the needs and wishes of consumers' emerging expectations of luxury hotels (DOLNICAR, OTTER, 2003; MANDELBAUM, LERNER, 2008; KOH et. al., 2010). This development raises questions as to what value a spa now has for a hotel establishment in London (DOLNICAR, OTTER, 2003; SCHWEDER, 2008; SPA CREATOR, 2012; WHITTLE, 2012; KNIGHT FRANK, 2014). If every competitor has similar facilities and concepts, there is no competitive advantage and it seems that the London luxury hotel spa market is saturated (SCHWEDER, 2008; GSWS, 2013; VERNON, 1966; XU, 2005). Pressure is on managers to make hotel spas into profit generating centres (WALDTHAUSEN et al., 2014). Hotels that offer spas need to devote more resources to the spa department in order to help rejuvenate and gain identity amongst competitors. For an investor or hotelier considering to develop a luxury hotel in London, the need to

have all facilities generating substantial revenue is essential and there are questions whether it is a good choice to have a spa facility (or not).

The literature suggests that a luxury hotel has difficulty to compete in the market place without having a spa facility. Recent evidence in the literature is scarce about the hotel spa situation. There is a need for up-to-date research for hoteliers in the field of hotel spas. Some recent sources (WALDTHAUSEN, HODRAI, STURMAN, 2014) suggest that the addition of a spa can cause difficulties in the work place and therefore raise questions about its necessity. Reports from industry describe the economic value of the hotel spa sector to be ever growing (TABACCHI, 2010). From the literature it was concluded that a spa's main purpose is to enhance the occupancy rates and average daily rates for a hotel (THORNSTEINSDOTTIR, 2005; DUSSEAU, BRENNAN, 2008; O'FALLON, RUTHERFORD, 2011). Other sources imply that contemporary spas are notoriously difficult to manage (GIBSON, 2008) and that the luxury hotel spa market is getting into problems (WALDTHAUSEN, HODRAI, STURMAN, 2014). Expanding on the literature, primary research was undertaken to find out how senior managers in the London five star segment perceive the value of spas in their hotels.

Methods

The opinions of senior managers in London Luxury Hotel market provide benefit by identifying different dynamics of value towards a spa facility. Interviewing was selected as the most adequate method for this investigation. Qualitative research is highly opinionated and attempts to bring forward opinions and views which can make a picture of reality (DENZIN, LINCOLN, 2008). The aim of qualitative research is not to test and confirm what is already known, but to discover new features of the topic (FLICK, 2009; WHITE, 2000). Before commencing the interviews, each participant was asked permission. The interviews were conducted during the months of December 2014 and January 2015. A total of eight carefully selected establishments were contacted to participate in this small scale research project. The establishments were

chosen because of their reputations for offering luxury services within London's hotel sector. Five establishments granted permission to meet with members of the hotel's senior management team to discuss issues relating to the value that is placed on the spa in the establishment and the developments that are evident in the hotel spa industry at the moment.

Findings

Two out of five interviewees had a positive opinion about the spa facility, while another two interviewees had a rather critical opinion about the spa department. The fifth interviewee had a neutral opinion and offered both positive and negative viewpoints on the spa facility in the hotel. Three out of the five interviewees emphasised the main purpose of the spa facility being a revenue stream, with one interviewee highlighting that the concept of spa is an integral part of the core strategy and the business' identity. The overall importance that spas play towards a hotels success again is varied. Two interviewees infer that the department has a very low importance towards the hotel success, while another saw the spa to have a somewhat moderate impact upon the hotels identity. One of the interviewees suggested the spa concept has a large influence upon the establishment's success.

The majority of the interviewees mentioned negative viewpoints which surround the hotel spa facility. It seems that the literature's tone that hotel spas should be profit centres in their own right (MONTESON, SINGER, 1992) is contradicted by some of the interviewees. Waldthausen, Hodria and Sturman (2014) proclaim that hotel spas are finding it hard to make a profit and this is confirmed in the general line of answering by the interviewees. The environment in which the hotels are currently competing has changed dramatically since Monteson and Singer's comments, especially with the increase of competition of different operational spas in the London area. The findings of this research confirmed the literature in the sense that the spa facility is seen to provide added benefit in helping to attract, maintain and increase average daily rates and

occupancy figures. High over-heads, strict budgets and the competitive nature of running a hotel spa within the city of London came out as issues in all interviews and these generated critical comments by the interviewees.

The spa hotel market is affected by the outside growth of the spa industry, with more spa outlets opening and operating within a short space of the sample area. Many hotel spas are in actual fact operating as 'day spas' but merely situated within hotels. The concept of spa is very much seen as just an added option in the hotel. Major emphasis is now placed upon the fitness areas and as quoted by one of the interviewees: "Remove the gym and we will be affected but remove the spa concept i.e. massage and there will be very little effect". Fitness areas are seen to be taking priority over the spa concept, which has an impact on the spa department. The addition of 'day spa' and 'retail spa concepts' to the hotels are developing quickly around the Knightsbridge and Mayfair area, meaning that consumer temptation to go elsewhere is a likely scenario according to the interviewees.

Conclusions

It became clear from the research that the main purpose of a hotel spa is to provide economic revenue towards the hotel through internal and external clientele. This research concludes that senior management opinions of London's Luxury Hotels about hotel spa facilities are varied. The majority of opinions, however, towards the spa facility was negative. Reasons for this is related to the difficult context in which Luxury Hotel Spas are competing with the constant need for re-investment in facilities, high overheads and difficulties to convert hotel guests to spa guests.

Subsequently, the hotels have to rely on external guest revenue to reach the spas operational break-even point. The main purpose of a luxury hotel spa in London is to act as a revenue stream, adding to the revenue generated through other departments such as food and beverage, rooms and banqueting. The importance of a hotel spa to London's Luxury Hotels has been identified to be varied depending on the establishment and its

spa concept prominence. A spa is seen to be important in regards to acting as an additional marketing tool and as an additional revenue stream for both internal and external markets. The main priority in the hotels at the moment is, however, on the health, leisure and fitness facilities. It is seen that spa facilities in the luxury hotels are highly commercialised and operationally adapted to become an additional revenue stream. For some hotels the importance of the spa concept is greater than for others meaning it is the individual hotelier who concludes how important the concept of spa is in his hotel and this is related to the amount of revenue the spa is able to generate overall.

A luxury hotel wishing to open within the city of London will find it extremely hard to compete without a spa and leisure facility, especially with the spa now being deemed an expected element within all luxury hotels. It is still unclear what services and amenities a spa facility needs to incorporate. Further research is needed to recommend hoteliers on the best approach to take. It can be concluded that a spa facility can play a significant role in being an extra revenue stream, for attracting both internal and external clientele. Some facilities are considered to hold more relevance than others, such as fitness and leisure facilities.

A spa facility within London's luxury hotel spa market has difficulty in converting hotel guests into spa guests. This means that from a revenue generation point of view, pressure is placed upon the spa department to actually break-even rather than making a profit. According to the interviewees in this research there is an emphasis on consumer's lifestyle, regardless whether a client is leisure or corporate, which emphasizes the need to use fitness facilities in order to maintain a healthy lifestyle. The addition of treatment rooms is indicated to be an optional extra but does not play as much importance as for example a gym. A large proportion of the revenue generated in the spa department is supplemented through the use of the leisure and fitness facilities, with a lot of emphasis on leisure memberships due to the "guaranteed" revenue it produces.

Questions remain therefore, whether it is recommended that a luxury hotel in London focuses solely upon the fitness and leisure departments rather than on the

treatment services. Further research is needed to look at consumers' opinions of the spa facility, most notably what facilities they wish to be included within the spa department and the likelihood of them being used. Consensus can then be reached, based on both the hotels management and customer viewpoints in order to benefit hotels from a financial and competitive perspective, as well as a guest satisfaction standpoint. It also recommended that further research is conducted in order to provide a more comprehensive view on the current state of the hotel spa industry.

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