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# Suppliers' perspectives on the affordability of wellness services

Eleni Michopoulou, University of Derby  
Veronika Kudrakova, University of Derby  
Iride Azara, University of Derby

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## Abstract

*This paper looks into suppliers' perspectives on the affordability of wellness services. It is becoming generally understood that prevention and health promotion are more cost-effective than the current model of sickness cure. There is strong evidence that suggests that the adverse financial situation of the population impacts the usage of wellness services. Using an inductive, qualitative methodology, a number of interviews with wellness suppliers and local council were conducted. Findings demonstrated that there are significant operational and commercial barriers in making wellness services more affordable. Conclusions indicate that potential solutions can be realised through the collaboration between wellness suppliers, 3<sup>rd</sup> parties and public sector bodies.*

**Key Words** *Wellness, Wellness services, Affordability, Wellness supply, Pricing*

**Theme** *Wellbeing, health, wellness and spas*

## Introduction

Recession has undoubtedly had a major impact also on the consumer behaviour of wellness customers (SRI International, 2010; Mintel, 2015; Mintel, 2009; Mintel, 2010; Flatters and Willmott, 2009; Tabacchi, 2010). According to the results of a Mintel research on the UK spa and salon sector, 35 million adults spent £5.2 billion in the course of 12 months leading to September 2009 (Mintel, 2009). However, this number was lower by almost a million in 2009 in comparison with the number of consumers treating themselves in 2008 (Mintel 2009). The recession has also influenced the UK population's leisure habits 'with 53% of consumers staying in more and 59% spending less when they go out' (Mintel, 2010). A Mintel report on health and fitness clubs have identified that 23% of the total respondents cancelled their private gym or health club membership due to the financial crisis, 11% reduced the frequency of visiting a gym and 11% joined a pay-as-you-go gym (Mintel, 2015). It is pertinent, therefore, to examine the affordability and perceived value of wellness services.

## Theoretical Background

### Price sensitivity and elasticity of wellness services

The most ominously recognized shift in the post-recession consumer mindset by researchers is price sensitivity (Mintel, 2011; Flatters and Willmott, 2009; Mintel, 2010; Euromonitor International, 2010; Euromonitor International, 2011; Verschuur, 2011; Tabacchi, 2010; Turnbull, 2010; Champalimaud, 2010; Mintel, 2013; Coyle, 2011). This is underlined by the fact that consumers are more "value conscious" (Kotler et al. 2013, p.317) as a result of the financial crisis and therefore place greater significance on revaluating the price

and the value of a potential purchase. The value of a spa treatment seems to have dropped in the consumers' perception as 61% of the 2010 National Health and Fitness Omnibus Survey's respondents regarded spa treatments as luxury that should be done as a special treat (Champalimaud, 2010). Moreover, 10% of the female consumers excluded the spa visit in 2009 completely and 23% have reduced its frequency (Mintel, 2009).

Many of the spa service purchases could arguably be associated with hedonic consumption, thus motivated by the anticipated feelings of enjoyment, excitement and escapism derived from the experience (Roy and Ng, 2012). As a result of the financial crisis, however, consumers have been less willing to spend as much money on spa services associated with overindulgence and luxurious spending as prior recession (Champalimaud, 2010; Mintel, 2011). In fact, one of the biggest concerns of a Mintel spa survey's respondents were indeed overpriced treatments (Mintel, 2009). This indicates that hedonistic consumption although acceptable for consumers in the past is less justifiable in times of economic austerity. The phenomenon of the "lipstick effect" has been observed when the consumers still purchase smaller luxuries despite reducing spending in general (Smith & Puczko, 2008; Tabacchi, 2010). In case of the spa industry, spa consumers in favour of pampering opt for less expensive treatments such as manicures instead of massage, and purchase cosmetics rather than having facials (Tabacchi, 2010).

Nevertheless, there is an opposing behaviour prevalent in post-recession spending when consumers still purchase the originally more expensive treatments; however they search for bargain purchases, value for money and "*trade down on brands*" (Tabacchi, 2010). According to a Mintel report 70% of consumers take advantage of vouchers, offers and discounts (Mintel, 2010). In a research conducted by the Coyle Hospitality Group 30% of respondent said to have purchased a massage on a deal site promotion (Coyle, 2011). Purchasing deals on third party websites such as Groupon has become increasingly popular as more than 20 similar companies have launched in the UK only (Champalimaud, 2010). Current research shows that the most frequent shopping strategy for promotions and discounts are search engines and deal sites (Coyle, 2011) and that 50% of the consumers indeed research before deciding to buy (Mintel, 2010; Mintel 2009). Moreover, deal sites also serve as a point of information for the consumers, as a research by the Coyle Hospitality Group has presented that 52% of the respondents have used Groupon to acquire information of the venues (Coyle, 2011).

All these factors render a high price elasticity of demand for wellness services which is a measurement of the "*sensitivity of demand to changes in price*" (Kotler et al. 2013, p.316). The high price elasticity is achieved due to the vast number of suppliers offering wellness services that then present plenty of substitutes for alternative purchases enabling consumer to seek the best value. The prices and offering can also be easily compared thanks to user generated review sites, deal sites, etc, which, as discussed above, is a common shopping strategy of the post-recession consumer. Kotler et al. (2013) emphasise that factors such as adverse economic climate and ability to compare prices online contribute to higher price sensitivity of consumers and understanding the "*trade-offs that people are willing to make between price and product characteristics*" is increasingly more significant for companies.

### **Perceived value of wellness services**

Both researchers and industry professionals recognize that the paradigm shift to wellness is indeed triggered by the shift in the mindset of the people (Edlin, & Golanty, 2014; Percival, 2011; Tabacchi, 2010; Diagonal Reports, 2011; SRI International, 2010) which inevitably leads to significant consequences in the consumer behaviour of wellness customers. The GSS had clearly emphasized this idea in 2010 when they referred to wellness as a "*grass-roots movement, driven by individuals, entrepreneurs, and small businesses*" (SRI International 2010, p.36).

Financial instability stresses people out and that has an impact on their needs and choices as a consumer (Mintel, 2009; Tabacchi, 2010). As a consequence, such consumers seek simplicity in every aspect of the purchase stage that relates to the presentation of the offerings, understanding of the services and the experience itself (Flatters and Willmott, 2009). This can also be associated with utilitarian consumption which is known to be goal oriented, rational and relates to necessity (Roy and Ng, 2012). In the wellness industry context, the leading need of consumers is recognized to be stress reduction and relaxation, followed by the restoration of the mind, body, and spirit connection (Cohen, 2008, 2010; Smith & Puczko, 2008; Tabacchi, 2010, Voigt, & Pforr,

2014). Therefore, consumers prefer simple menus with therapeutic treatments (Tabacchi, 2010). While there has been a growing number of consumers less willing to spend on services they associate with pampering, on the other hand, more consumers have gained interest in services addressing the total wellbeing (Percival, 2011; Tabacchi, 2010; Diagonal Reports, 2011; SRI International, 2010). This represents a significant shift from pampering and indulgence focus of spa services to the focus on overall wellness which has been by many recognized as an emergence of a new paradigm, that of wellness (Tabacchi, 2010; Mintel, 2011; Flatters and Willmott 2009; Euromonitor International, 2011; Coyle, 2011).

The new paradigm also represents a shift from reactive approaches to health to proactive and holistic approaches that address or prevent the root causes of the problems (SRI International, 2010). The concept of prevention has been recognized as a growing trend and is also closely linked with a more practical and economical implication, that is the reduction of health care costs (Edlin, & Golanty, 2014; Tabacchi, 2010). Apart from the economic consequences of wellness, current research has highlighted a considerable greater potential of this concept as it is starting to be regarded as a '*fundamental human right*' and an '*all-encompassing belief system*' (McCann Truth Central 2013, p.4) elevating it to a platform of a sort of secular spirituality. Finally, wellness as a concept also offers an opportunity to redefine spa after the recession as a place offering services with real benefits and thus constituting a crucial place in maintaining a healthy lifestyle (Smith & Pucsko, 2008; SRI International, 2010; Voigt, & Pforr, 2014).

However, although there are indications that wellness services are not currently affordable for the majority of people (Department of Health, 2013; PricewaterhouseCoopers LLP, 2008; Department For Work And Pensions, 2010; Winters et al, 2010), there is an absence of focus on the actual price tag the consumers would find affordable. Moreover, there is little information about the factors influencing the pricing of wellness services.

## Methodology

The objectives of this study are to acquire the standpoint of the wellness service providers and the local council on the matter of affordable wellness services. This is achieved by deploying a qualitative, inductive research design, and conducting semi-structured interviews with selected providers and a Council Representative. Semi-structured interviews are considered to be a suitable form for acquiring more detailed or in-depth information (Lincoln, Denzin, Norman, 2005).

To satisfy the abovementioned objectives, interviews were pursued with a representative of the council as well as representatives (at managerial level) of wellness providers of each distinctive type of wellness establishments identified by Wandsworth Council Borough: 1) Spa, 2) Integrated health/ wellbeing/ wellness centre offering yoga, Pilates, fitness classes and holistic treatments, 3) Fitness centre with gym and swimming pool, 4) Gym, 5) Leisure centre (Council owned), 6) Yoga studio (cluster sampling). In this case the self-selection sampling strategy was used where all the available subjects will be invited to participate and the first provider of each category signalling their willingness to be included in the research will be interviewed.

Data was collected over a period of the first four weeks in June 2015. The duration of the interviews ranged between 25 and 40 minutes. Participants were informed about the purpose of the research and their rights and asked to sign a consent form specifying the use of quotations and also their agreement to participate.

## Findings and discussion

Although several wellness providers under each established category have been contacted in order to conduct interviews, negotiating access has proven to be utterly difficult with very few willing to participate. With this in mind, results need to be viewed as highly contextual and indicative only. Thus 3 interviews with 3 different types of providers have been conducted, all of which requested to remain anonymous along with their company names. Therefore, they will be referred to as the Gym, Yoga Studio and Physiotherapist. The interviewees of the Gym and the Yoga Studio were on a managerial level with an understanding of the operations, however without a clear understanding of the expenses and the bookkeeping of the companies. The interviewee from the Physiotherapist company was the owner and therefore aware of all aspects of the business.

The company and client profiles along side with the average monthly spent by the average client have been collated in the below table for the ease of presentation.

**Table 1. Company profiles**

<b>Company</b>	<b>Gym</b>	<b>Yoga studio</b>	<b>Physiotherapist</b>
Years trading	2.5 years	2 years	8 years
Business ownership	Budget gym chain, 66 in UK	1 location, 1 owner, 2 investors	2 branches 1 sole owner and shareholder
Business growth	Very good year	300 members, at maximum capacity	n/a
Offerings	Use of Gym – more equipment than elsewhere Add-on services Monthly memberships	Hot power Vinyasa yoga workshops Monthly memberships	Mainly Physiotherapy Support services : Pilates, sports and deep tissue massages Also an umbrella beauty clinic
Client profile	“commuters”- City worker, 30-40 age Local 21-28 age 15-20% is the corporate membership	30% males, 70% female mid 20s to early 40s fitness oriented, athletes	young professionals, probably age between 25 and 45 many attend the next door gym
Financial capability of clients	Mixed- clients who come because it is affordable and clients who could afford more	Mixed- because of the affordable intro offer £35/month Members- various & professionals	mainly employed young professionals
Average spent by client	£25.99/ month	£79/ month	£100/ month
Proactive vs. reactive use	n/a	get the balance with flexibility and strength	Reactive- come when injured

### **Price sensitivity - Provider’s perception of price as a barrier to using their services**

As far as the Gym’s clients are concerned many of them join because of its affordability, however they have also clients who could afford more but they prefer that particular Gym because of convenience. As the manager said: *“We don’t get a lot of people that leave because of price”* which is not surprising considering that it is a budget Gym. The Gym is considered a budget gym already offering affordable prices enabled by its low-cost operation strategy of minimizing staffing costs. The Yoga studio acknowledged that affordability is a concern that inhibits the repeat use of their services by their customers. Therefore, they reduced the cost of the membership since opening along side with the membership options; they also amended the introductory offer to a better deal, 1 month for £35 which did lead to an increase in members to such an extent that during the busy period of October- May they reached their full capacity and weren’t able to take on new members. In case of the Physiotherapist clients, the owner explained that the clients’ perceptions with regards to wellness affordability are skewed. In particular, they claim that while price overall is a barrier to wellness services consumption, at the same time clients are prepared to pay the price tag if they know they get a good service. Their answers indicate that with reduced prices their clients would be able to afford more treatments as opposed to just having one when they need it: *“We obviously would hope that people would come more for prevention but because we’re a*

*private facility a lot of people think of saving the money and then when they're injured than they're prepared to spend the money".*

### **Suppliers pricing structures and willingness to reduce prices**

The Gym is able to charge lower prices due to their low cost operation with the lack of additional facilities, minimizing staffing levels (i.e absence of reception), not offering extras. Furthermore, their add-on services (weight loss course, personal training session, etc.) are charged at competitive prices relevant to the location. Also being a big company renders them in favourable position when negotiating deals with 3rd party contractors enabling them to keep their operation costs down. Nevertheless, this particular branch of this budget Gym chain is the most expensive *"because we've got quite a large membership base so the price level is high"*. However this is also due to the location with reasonably affluent population, presence of the bigger more expensive brands but a lack of competition from other low-cost operators. Price reduction would not be a favourable option; first because the financial capabilities of their customers are already met, and secondly, and most importantly, price reductions bear an inherent risk of *"diluting the product"*.

In case of the Yoga studio, they a small enterprise and therefore in a less advantageous position when it comes down to expenses and marketing, the main concern being staffing costs and losing profit for future growth. The Yoga studio used a competition-based pricing initially and tried to charge the same or lower prices. However, 8-9 months after opening they reduced their prices and changed their offerings. The Yoga studio might consider further price reductions in the future; however they would not in the position to do so now, as they are in the process of extending their studio spaces *"to move the studio forward"*. Nevertheless, the case of the Yoga studio did demonstrate the fact that lower prices attract more customers as after reducing their prices they were operating on full capacity. Although the impact of this on their operations and potential additional costs is not known, the fact that they are planning a studio expansion in the near future does indicate the success of their business.

The Physiotherapist uses the combination of cost-plus and competition-based pricing to cover the costs involved and aiming to stay in the lower range of the prices amongst the competitors. Nevertheless, it is obvious that the Physiotherapist's pricing structure does not meet the financial capabilities of their customers as those mainly use their services for reactive reasons when injury occurs, as opposed to for injury prevention that the Physiotherapist's main focus is. However, physiotherapist was reluctant to reduce prices for a number of reasons. First, their pricing strategy reveals that their current prices due to their effort of staying in the lower range amongst their competitors they already generate low profit margins. The Physiotherapists, being a *"very small profit margin business"* and in the lower range with their prices, cannot afford the price reductions. On the contrary, with the inflation and rising costs, price increase could benefit them, however that is not possible due to price regulations by the health care insurers. Another reason why price reduction is not a feasible option is that it implies employing therapists at a junior level that need constant supervision from the senior staff which then eventually leads to higher staffing costs. The Physiotherapist does, however, point out the impact of price reduction on the operations that yields a high volume of low paying customers that eventually leads to higher staffing costs mainly for more administration involved. Furthermore, the difference in operations management of classes and treatments also leads to different problems. Staff wages play an important part in case of treatments where price reduction is not possible without compromising the wages of the staff that they seek to avoid in order to be able to offer competitive salary and thus attract highly qualified and professional staff. In this way, price reduction could be potentially made possible by employing junior staff, which, however, is not feasible for this business as due to their good reputation and aim to provide exceptional professional service, supervision by a senior therapist would be necessary that would eventually increase the staffing costs.

### **Standpoint towards running in-house offers or promotions on deal sites**

The Gym does not run promotions on deal sites as it is not necessary for them, having maximised their capacity. The Yoga studio trialled a deal with Groupon when they opened. She was not employed there yet, however believes that *"it became quite complicated"*. As far as in-house offers are concerned, there is *an*

introductory offer £35 to new members who if sign up for membership immediately after receive a £10 reduction in membership which then costs them £79 a month. In case of the Yoga studio the offers are directed to getting more people through the door with their introductory offer and having the most of them signed up as members by offering them an exclusive deal. Furthermore, they manage to keep and expand their membership base by encouraging their clients to exercise yoga as often as possible to see the benefits themselves thus enabling yoga to become their lifestyle and demonstrating the value of their offering as opposed to reducing their price (and necessity of profit in order to finance their studio expansion).

The Physiotherapist runs in-house deals on a monthly basis for the Pilates classes, beauty and massage services according to the need. They take the form of discounts or add-on packages. Physiotherapy being a healthcare treatment is excluded from these offers. With the offers they aim not to sell them to those clients who would have paid the normal price. Regarding promotions on deal sites, they completely avoid doing them after an unsuccessful attempt with Pilates classes where the classes for that offer became full, however the return rate “*was shocking*” despite having been offered a good deal. This in fact, created administration and staffing costs for the company having needed to recruit staff because of the extra workload. Also to encourage attendance in less popular classes and having treatments more often, the strategy of running monthly offers is applied. While the offers also include value adding promotions, discounting less popular treatments and classes poses doubts about it being the best strategy for meeting their clients’ needs.

### **Cooperation with a 3<sup>rd</sup> parties and the role of the council**

Whereas none of the companies find price reduction feasible they do seem to be adamant towards 3<sup>rd</sup> party partnerships and do currently run some. Two mindsets in business leadership seem to be contrasted here, the one focussed on community engagement and support and the other on profit making. Again, the difference in operations management of a gym, classes and treatments are made apparent. Both Gym and the Yoga Studio are involved in numerous partnerships offering reduced prices to certain groups of people whereas the Physiotherapist emphasises the difficulties of operations than the benefits to the business in relation to them. The Yoga studio also offers “energy exchange” that allows people to work for the business and exchange these hours for being able to practice yoga there.

With regards to 3<sup>rd</sup> party collaborations, the Gym works together with Gym Flex that provide corporate gym membership to large organisations. They also offer the benefit of a “no joining fee” to Wandsworth Council staff and college students from the college opposite them. The Yoga studio supports the Douglas Bader Foundation and hold a class once a week which only costs £6 (£16 normal price) and all the revenue generated proceeds to the foundation. They also cooperate with the Africa Yoga Project and raise money to pay the salary of 1-2 teachers there that train Kenyans to teach yoga who then go to the communities, slums and prisons. They have also recently started to cooperate with a local app, “let ya no” that offers you discounts in local venues, £8 drop-in price in case of the Yoga studio in return for feedback about the places. The Physiotherapist holds different arrangements with various groups of people who have been referred and offer discounts to them. They also participate in council organized events, such as the “Get Active day”.

The role of the council was then discussed in terms of appetite for collaboration with the private providers. All of these providers are open for partnerships with Wandsworth Council; however they do emphasize the lack of initiative from the Council’s part in this matter. Furthermore, the Yoga studio and the Physiotherapist do underline the high business rate payable to the Council that even with the “business rate relief” seems too high for small enterprises. The Physiotherapist owner believes that “*small businesses need to have lower expenses*” as their costs increase, however they cannot charge more because of the health care insurer contracts. Therefore, they see great potential in reducing the business rates and other Council related fees. The Yoga studio would alternatively welcome the council to advertise their community class that is a reduced rate. The providers’ willingness to cooperate with third parties does pose a potential way of offering affordable services to people irrespective of the council’s involvement.

### **Explore the local Council’s propensity towards cooperation with the WSP**

The interview with the Wandsworth Council Representative has yielded several findings. First, it has become apparent that cooperation with private businesses is only marginally practiced in relation to wellness service provision. Although there seems to be a potential inclination towards doing so, the lack of experience and confidence in this field seems to be a barrier. Secondly, the role of wellness services in health and wellbeing promotion does not seem to be recognized. This reflects discussion on the government white paper “Living Well for Longer: A call to action to reduce avoidable premature mortality” (Department of Health, 2013), where there seems to be an emphasis on prevention but without any recognition of the potential role of wellness services in this matter.

Finally, different interpretation of terminology seems to affect the understanding of the role and benefits of wellness services. They are referred to as leisure services and form part of the Department of the housing and community service. Despite Wandsworth Council’s focus on health improvement and promotion, prevention and early intervention, building resilience and increasing vitality and active participation, there is not a dedicated department for the provision of services supporting the above outside the medical settings.

## Conclusion

This paper set out to discuss affordability of wellness services, as it constitutes a problem for consumers (SRI International, 2010; Mintel, 2015; Mintel, 2009; Flatters and Willmott, 2009; Tabacchi, 2010). It became clear that 1) the current economic climate affects the consumer behaviour with consumers becoming more price-sensitive (Mintel, 2011; Flatters and Willmott, 2009; Mintel, 2010; Euromonitor International, 2010; Euromonitor International, 2011; Verschuur, 2011; Tabacchi, 2010; Mintel, 2009; Turnbull, 2010; Champalimaud, 2010; Mintel, 2013; Coyle, 2011) and 2) it yields a high price elasticity of demand affecting businesses and the way they are run (Kotler et al., 2013). One of the key conclusions is that affordability should be jointly addressed by wellness providers and political bodies. Prevention, health promotion, and in fact, wellness enhancement should be facilitated and supported by the government based on the financial unsustainability of the current model of cure with the focus on sickness rather than wellness (Edlin, & Golanty, 2014; Winters et al., 2010; WHO, 2013; Becker, 2013; WHO, 2012; Tabacchi, 2010; Malleret in McGroarty, 2013) and the financial benefits of a healthy population. Further research should explore the possibilities and modes of cooperation between private businesses and political bodies in order to render wellness services affordable.

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