

Spas: a 21st-Century Perspective

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Summary

This article examines the evolution and current state of the spa market and looks at trends that are driving it such as relaxation and the quest for healthier living. Is this a recession-proof sector of the leisure industry? 21st-century experiences from spa operators provide illuminating evidence. Consumer motivations for visiting spas is considered as well as their expectations of a spa experience. Outline costs for developing a spa are given, providing valuable information for hotels and destinations considering a spa investment. The article concludes with a look at the current state of the market and outlines further opportunities for growth.

Introduction

Spas have traditionally been places that people go to experience healing or other health-related treatments associated with hot or mineral springs. Indeed, the word 'spa' is derived from the latin *sanus per aqua* meaning health by or through water. Well-known examples include Bath and Leamington Spa which grew as tourism destinations on the basis of their thermal waters. However, medical treatments associated with spas fell out of favour in the UK in the 19th and 20th centuries, which caused tourism to wane too.

Spas and spa towns have, over the past 20 years, reinvented themselves as destinations for people wanting luxury and pampering, rather than cures for medical complaints. Victor Middleton [\[1\]](#) in his book *British Tourism: The remarkable story of growth* comments on this:

'British spas never recovered after the losses of the Second World War and the advent of the National Health Service, which prescribed ordinary tap water in towns for hydrotherapy. It was not until towards the end of the twentieth century that interest in health linked to recreation was commercially viable again in Britain, with large investment by commercial operators in mineral waters, health "farms" and residential centres usually in the countryside, health clubs, saunas and gymnasia.'

This article examines the recent growth in the spa market and considers the trends that are driving it. It outlines the typical spa user and offers practical advice to hotels and spa businesses. It concludes with a snapshot of the industry at present.

The development of the spa market

Britain has a long history of spas. Hembry [\[2\]](#) records that there were over 150 spa towns in England alone at the peak of their popularity. These were fairly evenly spread out across the country and by no means limited to coastal destinations.

Wales had spas in destinations such as Llandrindrod Wells and Trefiw Wells. Scotland had spas Moffat, Strathpeffer and Bridge of Allan, among others. England was best known for the spa towns of Bath, Boston, Buxton, Cheltenham, Harrogate, Leamington Spa and Tunbridge Wells. Today just ten spa towns remain in the UK and are members of the Spa Business Association [\[3\]](#).

Twenty years ago spa tourism [4] scarcely existed in Britain. Spa towns had long since been in decline and destination spas such as Bath Thermae Spa closed its doors in 1978.

Revival of a spa industry

As explained in the Tourism Insights article [Health and Spa Tourism in the UK – the Potential](#) (May 2003) [5] the concept of a tourism sector centred on health and wellness was relatively new to the UK in 2003, but was well-established in other European countries and elsewhere globally. It found that only 300,000, or 0.3%, of all UK holiday trips in 2001 were for health and fitness or beauty and therapy purposes.

Another Tourism Insights article, [The latest trends and developments in the health and spa market](#) (May 2004) [6] illustrated that the growth in hotel spas was starting to show in response to demand from visitors who wanted to experience a sense of wellbeing and bring balance and peace into their daily lives. From then on the UK spa industry started to develop apace.

Modern spas have moved far away from their hospital-like origins, offering luxurious surroundings and a relaxed atmosphere, and are located anywhere in the country – not just in places that have access to mineral waters and natural springs. Consumers are recognising that spas are not about beauty, but about health and wellbeing. Different types of spas are on offer too, from destination spas to day spas as well as spas within hotels.

In August 2006, following receipt of a grant award of £7.7 million from the Millennium Commission Fund plus city and private sector funding, and research by companies such as Deloitte Touche which gave confidence that there was market demand for the redevelopment of the spa, the Bath Thermae Spa opened. It is run by the Dutch firm Thermae Development Company whose managing director, Henk Verschuur, has over 20 years experience operating spas in mainland Europe. The only natural spa in the UK, it is now recognised internationally alongside historic spa destinations such as Baden Baden in Germany and Vichy in France.

During its first three years of operation Bath Thermae Spa has seen visitors number increase, year-on-year: 2006/07 saw 150,000 visitors, in 2007/08 there were 180,000 and in 2008/9 they reached the 200,000 mark.

Interestingly, Bath Thermae Spa receives regular referrals from the [Royal National Hospital for Rheumatic Diseases](#) and accepts their patients to bathe in its waters. So, some spa visits linked to medicinal needs remain today within the UK, but is much more popular internationally.

Since launching his first spa in 2004, Dave Courteen, managing director of [Imagine Spa Management Services](#), has also seen his business go from strength to strength. Imagine Spa Management Services operate thirty health and spa facilities across the UK, currently managing eight spas on behalf of clients including Best Western and Radisson.

Motivations for visiting a spa

In the May 2004 Tourism Insights article [6] mentioned above, [ESPA International UK](#) research showed that 71% of national and international spa-goers were in pursuit of relaxation and wellness.

VisitEngland launched a *Just Relax* campaign in March 2005 [7] aimed at consumers who wanted to take a break simply to relax. The campaign was based on research [8] conducted by England Research and BrandKind in October 2004 during which five focus groups were interviewed. This illustrated that a broad spectrum of people took holidays or short breaks with the main purpose of relaxation. One clear theme that emerged was that many people wanted to escape from a time-dictated stressful environment, clear their mind and connect with friends and family. They wanted to feel comfortable, pampered and well-looked after; and for the experience to be luxurious and indulgent.

Today, the main motivations for visiting spas, in Courteen's view, are that of health and wellbeing. There is some overlap with people who want pampering, while socialising and enjoying the experience with others are also important requisites.

Courteen believes the spa market has developed significantly in recent years partly because of what he terms the 'coffee shop phenomenon'. Basically people want to spend time interacting with others somewhere in the community – a third space, not work or home, where they can meet up with friends. As more of the workforce work from home, or communicate by email, the desire for face-to-face contact needs to be met.

A further motivator for consideration is the desire to repeat a previously enjoyable experience. Keep clients happy, price the product right, and repeat business should be forthcoming.

In summary, people visit spas for the following reasons:

- health
- wellbeing
- pampering
- luxury
- detoxing
- socialising
- celebrating.

There is a smaller market interested in holistic health, encompassing the mind and spirituality. which include practices such as yoga and reiki. And a luxury spas market also exists – as highlighted by the prices at the spa at the Mandarin Oriental Hotel in Knightsbridge – but again this is a relatively small market segment. However, it is within the mainstream spa industry, where consumers seek relaxation and pampering, that current opportunities for market development lie.

What do consumers want from a spa?

The general offering

Research [\[8\]](#) on which the Just Relax campaign was based concluded that good relaxing spas:

- made visitors feel special but were not intimidating
- made it clear what they were offering
- offered special value packages
- provided food and drink
- appealed to groups.

In terms of the infrastructure, the following is expected as a minimum by consumers:

- reception area
- treatments room
- a relaxation room
- changing room
- a thermal suite offering a range of hot and cold experiences, for example, a mineral grotto, an aroma steam room, a foot spa, and feature showers such as tropical rain and an ice fountain.

The necessity to maintain high quality standards, including scrupulous attention to hygiene, is stressed by most spa operators.

A relaxing environment

Day spas such as Nirvana, who have a large membership, and the Verbena Spa at the Feversham Arms, as well as those operated by Imagine Spa Management Services, report, unsurprisingly, that many people visit after work to relax and unwind.

Courteen says:

'People may want a treatment but they also want to the opportunity to chill and relax. They want 'me time'. There is also a trend towards wanting to feel really pampered. We offer a glass of champagne and Belgian chocolates on arrival which people love. Simple things can add to the concept of pampering. This includes the way customers are looked after.'

Independent advice from knowledgeable staff

The revived spa industry is still in a relatively early stage, similar to the health club sector 20 years ago. And, as was apparent then, product houses have huge control. Spa operators need to remain focused on the fact that the industry needs to be customer driven.

From Courteen's experience many spa visitors do not want to book specific treatments in advance. People want to discuss and receive advice about the most appropriate treatment with the therapist on the day.

There is a huge opportunity for the spa industry to develop in this way to meet consumer demand. Service, not products will continue to drive and differentiate the market.

Special events

Within the relaxing environment of a spa, there is also a demand for special events and themed nights.

At Best Western's [Ufford Park Spa](#) in Suffolk, managed by Imagine, spa and curry nights have proved to be popular, particularly amongst couples and friends. The Twilight spa package, where visitors arrive between 6 and 7pm, are popular in the winter which include the use of the thermal suites, sauna, foot and aromatherapy spas.

The Bath Thermae Spa staged a successful Malaysian themed promotion in 2009. To give the event a truly authentic feel they brought in four therapists and a chef directly from Malaysia. It paid results with 20% of visitors to the event coming from overseas.

Exclusive use

There is an increasing desire to experience a spa with a group of people, either on a short break or in day spa. This demand goes well beyond the original hen-party offering. Some spas now offer exclusive use for small groups for a few hours and special packages such as the inclusion of champagne and chocolates. These are proving both popular and profitable.

Who are spa users?

Spas are no longer perceived as decadent, but rather as a route to wellbeing. They are not the domain of affluent ladies, but that of hard-working people who want time out. Courteen has been surprised to find that his spa guests are slightly less affluent than his health club members.

In the final evaluation research [\[9\]](#) for VisitEngland's *Just Relax* campaign approximately 40% of respondents were men, 2% declined to answer the gender question, and 58% were women. It revealed that about one-third of visitors to destination spas are men. This figure is endorsed by Bath Thermae Spa where 66% of visitors are female and 34% are male, and Verbena Spa, based in the Feversham Arms Hotel in Helmsley in North Yorkshire, where around 35% of visitors to the spa are men.

In terms of age profile, the Bath Thermae Spa report that their visitors are evenly split across the 25 to 65 age groups, which is similar to the broad spectrum of visitors to spas run by Imagine Spa Management Services. At the Nirvana Day Spa, most visitors are 40 or over and at the Verbena Spa, the average age is approximately 40 years.

The BrandKind research for VisitBritain in 2004 [8] stressed that all participants were searching for an antidote to life at home, and that although relaxation applied to everyone, the appeal was strongest for those who either had children at home or who had not yet started a family.

In terms of relaxing breaks, the evaluation research [9] of the *Just Relax* campaign revealed that the most common party size is two people, and the average length of stay is 3.69 nights.

Domestic or overseas visitors?

This obviously varies depending on the type of spa. The fact that many people are visiting spas to relax after work illustrates that a large percentage of spa users live and work locally.

In May 2003, Nancy Cockerell and Jill Trew [5] noted that the health and wellness market was predominantly a domestic one – with only 1% of outbound trips from the UK, of four or more nights, being for such purposes. At the Verbena Spa the market is largely domestic at present, with one in 20 visitors arriving from outside the UK (most spa users stay for two nights at the hotel).

Visitors to Bath

Bath is a popular destination with both domestic and overseas visitors – 20% are local residents, 40% are day trippers and 40% stay at least one night. It is no surprise that 20% of visitors to the Bath Thermae Spa are from overseas. Marketing efforts focus on territories such as the USA, Canada, Malaysia and Belgium and this has paid off with visitors being drawn from these countries.

In a 2009 customer survey, 57% of visitors to Bath Thermae Spa said that the spa was the main reason for visiting Bath, supporting the view that a spa can be a driving factor in choosing a destination.

Origin of visitors

In terms of which countries visitors to UK spas originate from, The International Passenger Survey 2007 [10] asked visitors leaving from UK airports how they spent their time in the UK. The survey revealed that visitors from the US, followed by Germany, were the top two nationalities visiting a spa or beauty centre during their stay in the UK.

Investing in a spa

For hotels considering investing in a spa, is it worth it? Courteen, whose company is currently working closely with Millennium & Copthorne Hotels to develop urban spas, believes so. He recommends that existing hotel owners move away from traditional health clubs and large swimming pools and convert all, or part, into a spa facility. Converting spare room stock is another alternative.

The benefits for hotel owners include:

- increasing room occupancy
- increasing secondary spend from guests (they are a captive market)
- potentially reducing staff costs (through variable staff costs, rather than fixed staff costs required in a health club).

The most successful spas are high quality but small. Courteen stresses that a hotel does not need to build a large spa and suggests £350,000 as a minimum starting budget. If there is spare hotel room stock this is ideal for conversion and could reduce costs further. However, he recommends a minimum size of around 465 square metres for a hotel spa, which would cost approximately £450,000. An ideal spa is double this size, costing around £750,000 (working out at £750 per square metre). Adding a pool, which is not absolutely necessary in a hotel spa, would increase costs to up to £1500 per square metre.

Repair and maintenance obviously needs to be taken into consideration, too. Items in spas wear out and typically have a life-span of between five to ten years, and sandstone tiling, whilst looking attractive, needs a lot of cleaning. If standards in a spa slip, customers will be quick to desert the business.

When developing a spa it is essential to remain commercially focused, balancing the size and facilities of a spa against potential use. Ideally, payback periods for a hotel spa should be in the region of 24 months.

Learning from established spas

A spa in a hotel can, without doubt, increase room occupancy. This has been the experience of the Verbena Spa, accessed via a glass link bridge to the Feversham Arms Hotel. Owner, Jill Rhatigan, says:

'My greatest surprise has been the degree to which the spa and hotel experiences are inter-linked. Verbena has become a spa hotel much sooner than I expected, with the Feversham Arms winning the AA Hotel of the Year award in October 2009.'

The spa opened its doors in October 2008, following a £1.2 million investment in the hotel and spa, which has an estimated pay-back period of seven years.

Unlike health clubs, where good operators provide constant supervision, spa staff costs are variable, depending on treatments booked. A successful spa needs a reasonable number of staff to operate. However, not all need to be full-time or permanent. The Verbena Spa currently employs eight therapists as well as the manager and two receptionists. The Nirvana Spa employs 40 people to provide treatments, on a full-time, part-time and freelance basis.

Look for inspiration overseas

Any hotel owner considering opening a spa would be wise to look overseas for ideas of best practice and product development from resorts and hotels with a mature offering.

Many overseas countries, including Germany, Northern Italy, Scandinavian countries and Turkey have well-established spas and a tradition of taking spa breaks.

Italy and Germany

There are over 330 officially recognised spa towns and resorts in Germany. Spas are considered to be of medical importance and there is a tradition amongst German workers to have a two-week stay in a spa every ten years. The Kneipp resorts are popular and offer hydrotherapy using cold water. [Baden-Baden](#) boasts thermal baths dating back to Roman times as well as thalasso-thermal therapies.

Many spa towns remain in Northern Italy and the Italian spas in [Monte Catini](#) and [Acqui Terme](#) are noteworthy. Monte Catini makes medical claims for its waters on the basis that it heals the liver and digestive system and has nine hotels where the thermal waters can be taken.

France and Cyprus

When the Bath Thermae Spa conducted their research, prior to re-opening, they believe the best spas they saw were in France and the Netherlands. In [Vichy](#) the resort markets itself with a focus on spa breaks of a week or more with themes covering anti-ageing, slimming and coaching. The hotels also offer the full range of beauty treatments.

Cyprus has six hotels with spas linked to thalassotherapy located in the destinations of Limassol, Paphos, Pissouri and Polis, and the [Four Seasons](#) hotel opened its Shiseido spa at its hotel in May 2007.

Budapest

Finally, the 15 spas in [Budapest](#), which the Bath Thermae Spa view as fantastic, offer a mixture of thermal baths as well as Turkish and bubble baths. Here, the city has managed to combine hotel spas with a thriving public spa industry.

Quality-assessed spas

VisitEngland introduced an accreditation scheme for spas within their quality schemes in 2002, after it was approached by the [Spa Business Association](#) (formerly the British Spa Federation) to do so. The scheme was developed in conjunction with [Quality in Tourism](#), the [British International Spa Association](#) and the

Spa Business Association. It covers spa businesses in England, and there is no comparable scheme in Wales, Scotland or Northern Ireland.

There are eight categories of spa in the VisitEngland scheme: day spa, hotel spa, salon spa, sports and fitness spa, natural spa, destination spa, resort spa and medi-spa. To date there have been no spas in either the salon spa or medi-spa categories. Further information and details about how to join the scheme is available from [Quality in Tourism](#).

What are the benefits of being an assessed spa?

The Nirvana Spa in Wokingham is an accredited day spa and was an early adopter of the scheme. They use the accreditation process as an internal tool to maintain quality standards. Tim Harding, Managing Director of the Nirvana Day Spa, holds assessors in high regard, valuing their feedback enormously.

From a spa business's perspective the benefits of accreditation are as follows:

- totally independent review of the business
- snapshot in time
- useful quality marketing tool
- valuable detailed feedback from the assessor.

However, among spa users recognition is low. Tim Harding from the Nirvana Spa says that awareness of the accreditation scheme is 'reasonably high with the key players in the spa industry', however, he cannot recall anyone asking if it is accredited when they telephone to make a booking.

Alison Barham, Quality Development Manager at VisitEngland, agrees that the awareness of the accreditation scheme within the spa industry is good. However, Sarah Hugan at the Verbena Spa frankly admits that the accreditation scheme was something they did not know about when they started the spa in October 2008, but agrees that it's a very welcome standard for the industry as a whole.

Barham also notes that awareness amongst the general public is not as high as it should be, partly due to insufficient consumer promotion and the small number of spas that have applied for accreditation to date.

Bath Thermae Spa is the only accredited natural spa in England. Peter Rollins, Marketing Manager, agrees that the awareness of the scheme is miniscule. However he believes that once there is a critical mass of at least 50 accredited spas there will be peer pressure on other spas to join the scheme. He also believes that for the scheme to have real benefit it needs to be adopted across Europe.

Impact of the credit crunch

The spa industry is facing interesting times. The financial climate has had an impact on consumer spending and spa packages are more difficult to sell. However, spa businesses are riding out the storm, with recession accelerating structural changes that would, in any case, have happened.

The Bath Thermae Spa reports that visitor numbers are holding up in 2009 but with two important qualifications. Firstly, the number of visitors choosing a two-, four- or all-day package has not changed, but if they choose to have a treatment they are opting for less expensive ones. Secondly, there has been a decline in corporate hospitality.

The top end of the spa market has grown in recent years, but this rapid expansion has now halted with some construction projects being shelved. And spas in rural locations are finding it difficult to recruit or retain high quality therapists which also has an effect on growth plans.

Set against this, as already mentioned, spa operators are reporting growth in exclusive use and themed/special events. They are also finding that packages sold online on websites such as www.lastminute.com are continuing to do well.

Pricing

Tim Harding of Nirvana Spa stresses that it is a tough market where price is a key differentiator and he foresees more of the same in 2010.

Prices range widely across the industry, but to give an indication the Verbena Spa is a privately-owned independent hotel and part of 500 hotels around the world in the [Small Luxury Hotels of the World Group](#). Despite this, the pricing is competitive starting at £25 for entry into the spa including the heat experience.

Bath Thermae Spa reports that 69% of its visitors come to the spa for its fixed price two-hour package costing £22 and Butlins charges £19 for two hours in the wet room.

Current demand and opportunities

[Centerparcs](#) have featured Aqua Sana spas in their four UK sites for a number of years. [Butlins](#) too, has recognised the demand and unveiled the Ocean Hotel in Bognor Regis site this summer. The £20 million project includes their first spa. The 670 square metre facility includes a wet room, hydrotherapy pool, outside hot tub and a snow cave.

Since its opening, Butlins has reported that the Ocean Hotel has been running at 89% capacity with some 70% of people visiting Butlins for the first time [\[11\]](#). According to Richard Bates, managing director, the hotel is attracting new markets.

Imagine Spa Management Services are experiencing a 50% increase in business in 2009 compared with 2008. Courteen attributes this to two things: their routes to market are improved, particularly in online marketing and booking; and as people are working harder they are more concerned about staying healthy, realising the necessity of looking after themselves – a trend that was also apparent in the recession in the early 1990s.

A recent TravelMole article by Nadejda Popova, [\[12\]](#) endorses this. It reports that the recession is creating demand for spa and wellness. The article stated that three global regions in particular were performing well: Asia-Pacific (particularly Japan and Thailand), Middle East (particularly Dubai, Jordan, Oman & UAE) and Eastern Europe (particularly Bulgaria, Slovenia, Poland and Hungary). These East European countries are experiencing strong inbound spa tourism from German and Italian visitors.

Popova, Euromonitor International travel and tourism industry analyst, also predicts that there is an opportunity for organic spas to grow quickly, particularly those offering environmentally-friendly products or those featuring outdoor treatments and facilities.

Conclusion

Twenty years ago there was little, if any, tourism related purely to health and wellbeing within Britain. Since then, there has been significant growth in the development of spas, including day spas, hotel spas and destination spas.

Despite the economic downturn, the market for spas does not yet appear to be saturated. Research clearly shows a strong need for people of both sexes to take time out to escape the demands of a stressful work or home environment. Spas are, in part, meeting this demand and appear to be an almost recession-proof business.

The fact that many spa users visit after work illustrates the importance of the local market. Hotels considering developing this facility, or those already with a spa, should capitalise on this opportunity.

Hotels with existing swimming pools or traditional health clubs should consider the business case for converting them into a spa. The investment is substantial and has a lengthy payback period but a successful spa can justify this. Spas may well become the point of difference over budget hotels – where, for example, a three star spa hotel will compete successfully with good quality value hotels, such as Hampton by Hilton, even when they charge slightly more.

Businesses looking at developing a spa should look closely at overseas competition, as well as within the UK. There is no reason why, if hotel or destination spas in Britain were built to the required standard and offered facilities and packages to meet consumer demand, they could not attract inward spa tourism.

Finally, it should not be forgotten that today's success is borne out of the delivery of the service. So, whilst facilities are important it is the interaction with staff combined with experiences and products that exceed normal expectations that will win the day.

Further reading

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Much of the information contained in this article has been provided by the following organisations:

Bath Thermae Spa www.thermaebathspa.com

Imagine Spa Management Services www.imaginespamanagement.co.uk

Nirvana Spa www.nirvanaspa.co.uk

Verbena Spa at the Feversham Arms www.verbenaspa.co.uk

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