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Wellness surge breaks the Catch 22

New research shows there's a tipping point where greater business volume transforms profitability, indicating the industry must focus single-mindedly on all aspects of occupancy, from yield management to turnaway analysis. Wellness is also key

As more consumers turn to a wellness lifestyle, spas in urban hotels in the US are enjoying the benefits of increased volume, with profits up significantly, according to a new report from PKFC – *Trends® in the Hotel Spa Industry*.

The report shows spa and wellness as the standout performers: while spa revenues were increasing at 4.6 per cent in 2013, the combined revenues from other departments, such as food and beverage and retail, only grew by 4.4 per cent.

Couple this with the fact that spa managers controlled their cost increases to 2.5 per cent and urban hotel spa departments were able to translate this growth in revenue into a significant profit increase of 13.9 percent.

Andrea Foster, VP and national director of spa and wellness consulting for PKFC says the performance is in part explained by growth in volume: "Scheduling spa technicians has always been a challenge. However, as volumes increase, it's easier for managers to bring on personnel for longer shifts and have the confidence there'll be sufficient revenues to cover the labor cost."

There are wider lessons for the spa industry here. Too many spas are bumping along the bottom, with low occupancy leading to nervous management limiting therapist availability which leads to higher levels of turnaways, a downward spiral and lack of engagement.

It's exciting that consumer behaviour is driving urban hotel spas out of this Catch 22 situation and shows the profit potential spas have when they get critical mass.

We need to be brave enough to learn from this and risk ramping up wellness marketing and therapist availability.



PKFC says spa managers in US urban hotel spas translated revenue growth into a significant profit increase of 13.9 per cent

PKFC found evidence of a wellness ripple effect too, saying that the revenue sources that increased the most were whole-health oriented. They also found customers no longer expect a spa and wellness experience solely in the spa. "We expect hotels to take advantage of the desire for whole-health options and drive revenue elsewhere in the hotel by offering spa menus, healthy bedrooms/meeting rooms and fitness programmes like bike shares."

Wellness tourism is high on the industry's agenda (see our feature on page 96) and identified by SRI, for the GSWS, as a fast-growing, US\$494bn (€384bn, £301bn) market, with 587 million trips in 2013. It's fascinating to see how this trend is impacting the various market sectors as we move towards a more holistic approach.

Liz Terry, editor twitter: @elizterry

Can wellness help spas drive volume?

Comment on our blog at blog.spabusiness.com



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p40 Steve Jeisman, group director of spa and development at Alila Hotels & Resorts in Asia



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PHOTO COURTESY OF TE KAWANGA O NGAI TAHU



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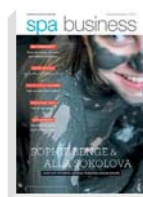
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On the cover: Exploring wellness traditions across Europe (p58)

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Letters

KATIE BARNES, MANAGING EDITOR, SPA BUSINESS

Do you have a strong opinion, or disagree with somebody else's point of view on topics related to the spa industry? If so, *Spa Business* would love to hear from you. Email your letters, thoughts and suggestions to theteam@spabusiness.com



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Spas need to address what happens when staff don't reach their retail targets

RETAIL TARGETS: WHERE ARE THE CONSEQUENCES?

Dori Soukup, founder and CEO, InSPAration Management

While crossing the Atlantic after attending the Global Spa & Wellness Summit (see p88), I reflected on points made by the speakers.



Retail expert Paul Price shared some great information on how to improve the sales experience. He spoke about in-spa marketing, digital marketing, emotional selling, appealing to peoples' dreams and more. He had great things to say but – yes here is the but – as an industry we're terrible at selling products!

We only have a sliver of the self-wellness product market share. Why? Because spa teams don't like to sell. Why are we so bad at retailing? It's due to the lack of

systems and training and, importantly, it's also due to the lack of consequences when targets are not met.

Of course performance expectations must be set first. To improve performance, leaders need to outline obligations in detail and set targets for both treatment and retail volume per guest. Then they need to measure them daily and reward and recognise when it's worthy.

But what happens when targets are not met? Typically when a team member doesn't recommend retail, there are no established expectations and consequences in place – and this is the biggest mistake I see spa owners make. Every day guests come and go, leaving

empty handed. This habit is costing spas major revenue. This is the only industry I know where a team can perform only half of their responsibilities (treatment without retail) and keep their job.

Spas need to address the 'what if'. What if staff don't reach retail targets month after month? What are you willing to do? You can train and coach them, but if they still don't do it, what will you do? How much money are you willing to lose because your team doesn't view retail as one of their responsibilities?

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GLOBAL ACTION NEEDED TO PROMOTE WELLNESS: A BASIC HUMAN RIGHT

Talal Bin Ali, founder and president, Enaya Care International

I've been in the spa and salon business for nine years, but my passion for holistic wellness was born in India in 2010. I spent a few weeks at a nature cure resort consuming healthy food, exercising and having massages. It was a life-changing experience as I got rid of my obesity, diabetic and high blood pressure problems.



My understanding of wellness matured. I realised that it's about preventing sickness and that wellness should be embraced by every nation and delivered to everyone as a basic human right.

I've just returned from the Global Spa & Wellness Summit (GSWS) and I was happy to hear about the Global Wellness Institute (GWI) – the organisation that's been set up to drive wellness tourism and the spa industry forward (see p94). It's a great starting point, but more must be done to get the message out to the masses.

I come from a background of working with global corporations

such as Unilever and have witnessed first hand how changes can happen if a clear strategy and action plan is put in place. I successfully lobbied at G8 level to fight against counterfeit products and fruitful results came from aligning interests. The GWI needs to do the same – lobby at UN and G20 levels – and fast. I have offered my assistance as it's my true vision to take wellness and the awareness of it global.

I admire the GSWS team for creating an international community which has wellness as a common interest. Although I do think they lack true global representation, as there's not much participation from the African nations or the GCC region either at the summit or on the board. This does leave me with doubts. But at the same time, I'm also hopeful that the GWI will be the light at the end of the tunnel.

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RIGHT TO REPLY

Susie Ellis, chairman & CEO, Global Wellness Institute

Global representation is a top priority for the Global Spa & Wellness Summit and is core to its DNA, as evidenced by the 400 people from 45 countries that attended our recent conference in Morocco. As part of our new identity – the Global Wellness Institute™ – we expect even more opportunity to diversify our board as well as future executive functions and committees.



Additionally, we're exploring strategic alliances and partnerships with organisations such as the World Travel & Tourism Council, the UNWTO and the World Economic Forum, as well as several multi-national corporations that are eager to both get involved in the work that we do, as well as to access the research and information for which our organisation is now known. We're grateful for the interest and generous support of forward-thinking companies like Enaya Care and are committed to expanding our global reach and public sector initiatives as we build our resources and necessary infrastructure.

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Alfredo Carvajal leaves WTS for Delos

Alfredo Carvajal has been appointed president of International and Signature Programs for Delos, the US-based company behind the Well Building Standard®.

Previously he was COO of spa and leisure consultancy WTS International.

In his new role, Carvajal will be responsible for Delos' Signature programmes in the hospitality and residential sectors, and for expanding Delos' businesses globally.

Read more: <http://lei.sr?a=J7Y1x>



US spa industry back on track says ISPA study

The total number of visits to US spas was estimated at 164 million last year, according to the new ISPA 2014 US Spa Industry Study, which is the highest number its recorded since it started tracking the sector in 1999.

Total revenues reached US\$14.7bn (£11.6bn, £9.1bn), up 5.1 per cent from 2012 providing "the strongest indication yet that it [the industry] is firmly back on a growth trajectory". In fact, it out-performed the wider US economy in 2013 where the growth in personal consumption on services was only 4 per cent in cash terms.

Read more: http://lei.sr?a=z4D6j_S

Gharieni launches spa consultancy division

Spa equipment manufacturer Gharieni has launched a spa consultancy division which will include services such as space planning, renderings and access to its global contacts such as designers and other spa consultants. "I like working with customers and I want to help them by putting projects together piece by piece," said owner Sammy Gharieni.

Read more: http://lei.sr?a=r6B6a_S



The global spa industry is worth US\$94bn and hot springs bring in revenues of US\$50bn

Spas outpace global economic growth shows study

Research revealed last month shows that revenue in the global spa industry reached US\$94bn (£73bn, £57bn) in 2013, a 56 per cent growth from 2007, compared to only a 31 per cent change in world GDP over the same period.

What's more, the number of spa facilities worldwide has increased by 47 per cent – from 71,762 in 2007 to 105,591 in 2013.

These figures form part of the *Global Spa & Wellness Economy Monitor*, a study



conducted by SRI International on behalf of the Global Spa & Wellness Summit (GSWS) held in Morocco in September.

When the global spa industry is combined with wellness tourism, the thermal/springs sector and wellness life-

style businesses, SRI values the total market at US\$3.4tn (2.6tn, £2tn).

To read more about the research see page 94 and to find out more about this year's GSWS read our review on page 88.

New Swiss hostel and spa target budget travellers

A youth hostel in the glacier village of Saas-Fee, Switzerland, opened in September with 1,900sq m (20,451sq ft) of wellness and sports facilities and declaring itself as the first "wellness hostel" in the world.

The 168-bed dormitory facility, WellnessHostel 4000, is situated at the foot of Mount Dom – which goes up to 4,545m (14,911ft) and is one of the highest mountains on Swiss soil.

Open for just over six weeks, it's already attracted a varied clientele including ski teams, mature holidaymakers and young people searching for cheap accommodation. Prices for beds at the hostel start at around CHF50 (US\$53, €41, £32) a night.

Massages at the Aqua Allain leisure centre start at CHF55 (US\$58, €46, £36) for a 30-minute treatment and go up to CHF135 (US\$142, €112, £88) for a 70-minute full-body hot stone massage.



A one night stay starts at CHF50 and the hostel is attracting a varied clientele

Facilities include a Finnish sauna, bio sauna, herbal steam bath, whirlpool, foot bath, an outdoor balcony overlooking the gorge, relaxation room, a phone/tablet-free area, a tea station and a 25m (82ft) indoor pool. There's also a gym equipped with machines by Nautilus.

Read more: http://lei.sr?a=T8w4J_S

Costa Rica's first-ever waterpark with thermal water opens

One of the largest waterparks in Costa Rica has opened in the Arenal region, with the bonus that it features thermal water as it's been built on top of a hot spring.

Located near La Fortuna de San Carlos, Kalambu Hot Springs Water Park combines the health benefits of a hydrothermal attraction with the fun of a waterpark.

The park's two pools – one of which is for adults only – are heated from a volcanic hot spring and they give visitors a chance to relax after a day of activity in the rest of the waterpark. The park says the thermal waters have therapeutic qualities too. It claims that the water can help to ease muscle and joint pain and also aid the body's metabolism.

This is the first time that a waterpark in Costa Rica includes thermal waters.



The Kalambu Hot Springs Water Park has two naturally-heated thermal pools

Other facilities at the park include an interactive area for children with water cannon and a giant tipping bucket. There are also three toboggan slides built into a single tower. Meanwhile, in a stand-alone

tower is the largest slide – the Mammoth which is 12.6m (41.3ft) high and 114m (374ft) in length. A restaurant and pool bar complete the offering.

Read more: http://lei.sr?a=8k7B5_S



The Deep Nature Spa at the Le Méridien Ile des Pins hotel will open in Q4 2014

Deep Nature to manage three spas in New Caledonia

Spa management firm Deep Nature has won contracts to run three spas for Starwood in New Caledonia in the Pacific.

It already operates three spas in the region and founder Julien Patty previously told *Spa Business*: "The government in New Caledonia wants to boost leisure and tourism and has looked at what we've done in French Polynesia" (see SB14/3 p34).

The properties include Sheraton New Caledonia Deva Resort & Spa Hotel, due to

open in early 2015, Le Méridien Nouméa Hotel and Le Méridien Ile des Pins.

Deep Nature hopes to increase spa revenue by offering promotions that allow guests to all three locations.

● Elsewhere, Deep Nature has appointed Magali Marco as director of development in Turkey. Marco's been in the industry for over 12 years, most recently working for L'Occitane in Europe and the Middle East.

Read more: http://lei.sr?a=p5F9P_S



SHUTTERSTOCK.COM/PRESMASTER

This case will affect employment law

US corporate wellness programme challenged

US firm Orion Energy Systems has been accused of overstepping its bounds by requiring an employee to undergo medical exams which a lawsuit contends were not job-related or necessary for business.

Employee Wendy Schobert was asked to go through multiple range-of-motion tests and provide a complete medical history as part of Orion's mandatory corporate wellness programme. Orion fired her when she did not comply.

The lawsuit, brought by federal body the Equal Employment Opportunity Commission, is the first to directly challenge a company wellness programme under the Americans with Disabilities Act.

Read more: http://lei.sr?a=Y2G2D_S

Taj Hotels pulls out of management contract

Tata Group-controlled Taj Hotels has terminated its management contract for the Taj Palace Marrakech after two years of operation.

Owned by JK Hotels, the 161-bed hotel opened to guests in November 2012 under Taj management.

The property also features a Taj-operated Jiva Spa.

Before Taj, the resort was originally due to be operated by the Mandarin Oriental Hotel Group.

The Taj portfolio now stands at 14 international properties, two of which are in Africa – the 193-bed Taj Pamodzi in Zambia and the 166-bed Taj Cape Town in South Africa.

Read more: http://lei.sr?a=d6W7k_S



The Vichy Spa International project will include a hotel and spa with 68 treatment rooms

Moroccan state-owned thermal spa projects revealed

Sothermy, a subsidiary of CDG – the Moroccan state-owned financial institution that manages the country's long-term savings – is developing a hot springs spa and hotel plus a public thermal bathing facility in Moulay Yacoub, one of the provinces of Fès-Boulemane in Morocco.

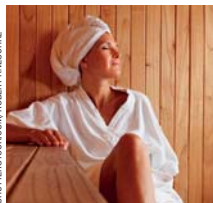
Sothermy (Société Thermo-medicale de Moulay Yacoub) was created in 1979 to manage Moulay Yacoub's collection of thermal facilities. Its finance is primarily

derived from CDG Development and from municipalities in Fès-Boulemane.

The new spa and hotel will be operated by Vichy Spa International and the new public bathing centre will be managed by Sothermy, which owns the whole complex.

The Vichy International-operated 100-key hotel will feature a 68-treatment room health spa and the public bathing facility will comprise 44 individual thermal baths.

Read more: http://lei.sr?a=j9W2U_S



Saunas will face a 'luxury tax' in July

German public saunas face increased taxes

Operators of public saunas in Germany say they'll struggle to make ends meet if the rate of tax they pay is increased from 7 per cent to the full value of 19 per cent.

Access to saunas is soon to be classified as a luxury by the German government, and will therefore be taxable at a higher rate.

Industry suppliers and associations gathered at the Interbad trade fair in Germany in October to plan a campaign against the tax that's due to come into effect in July 2015. They said that the tax hike cannot be absorbed by operators due to the extremely high energy costs in running thermal facilities, but that higher admission prices may lead to huge losses in customers.

Read more: <http://lei.sr?a=E1m6l>

South Korea reveals plans for a US\$275bn super city

An 80sq km (31sq mile) super city in South Korea, that's three times the size of Macau, is set to boast a wide range of leisure facilities including a medical-themed 'healing town', a theme park, casinos and luxury hotels.

An estimated US\$275bn (€202bn, £160bn) will be used to convert the small island of Yongyu-Muui, near Incheon International Airport, into a tourism hub that will attract up to 134 million visitors – mostly from China and Japan – a year.

Not expected to open until 2030, the '8City' site is being designed by UK-based architects Foster + Partners and is shaped like a figure of eight – a number which symbolises good luck in Chinese culture.

A special-purpose company called Eightcity was set up in December 2011 to develop the site. Investors include Kempinski, Korean Air, Daewoo Engineering & Construction and C&S Corporation.



8City will be designed by Foster + Partners and include a medical-themed 'healing town'

Other features for the proposed city include a Formula One race track and a 'hallyu town' showcasing traditional Korean entertainment.

It will create an estimated 930,000 jobs and has been described as the single largest tourism project in the world.

Read more: http://lei.sr?a=v3G4e_S

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SHUTTERSTOCK.COM/LENTEN KONINK

A 10 per cent spa tax is currently levied

Thai spa tax may be scrapped to boost tourism

Thailand's excise department may look to support tourism by abolishing a tax levied on profits made by the country's spas and golf courses.

Thailand's finance minister, Somchai Phasae, is currently looking at ways to reform the nation's tax structure to promote both tourism and public health.

Existing taxes on spas and golf courses already contribute several hundred million Thai baht to the excise department each year. Ten per cent is levied on spa service fees, golf course membership fees and services. Spas approved by the Public Health Ministry, however, are exempt from the tax.

Read more: http://lei.sr?a=K9r8s_S

Japan's spa reputation tarnished by recent news

A series of unfortunate spa-related incidents have taken place in Japan recently indicating poor regulation.

The Japanese Health, Labour and Welfare Ministry has identified approximately 330 unlicensed massage parlours in Tokyo, plus 110 qualified spas, that are responsible for injuring customers. The number of claims last year was 1,304, nearly double the amount in 2007.

In a separate incident this September, a man and woman died in a decompression chamber at a hot spring spa north of Tokyo. The door to the chamber failed to automatically open after a timed 45-minute session.

Read more: <http://lei.sr?a=h1T8U> and <http://lei.sr?a=Z0d8Z>



Aromatherapy Associates skincare products will be incorporated into Spa by JW treatments

Marriott teams up with Spa Strategy for new spa brand

JW Marriott Hotels & Resorts has created an in-house spa concept and is in the process of re-imagining more than 20 of its global spa facilities under the new brand.

Marriott worked with consultants Spa Strategy to create the Spa by JW concept, which has been developed to provide guests with an accessible luxury experience through express treatments.

While the Spas by JW will differ from property to property, they will all include

express spa suites, an open lounge space, a retail area and multi-functional treatment rooms a range of therapies.

The first of Marriott's spas to receive the design overhaul was the JW Marriott Houston Downtown, USA, which re-opened in September. The facility features two full-service treatment rooms, a couples' suite and four hotel rooms that offer spa loungers that convert into massage tables.

Read more: http://lei.sr?a=j3e2u_S

Europe's first Mondrian Hotel launches in London

Tom Dixon and Design Research Studio have unveiled Europe's first Mondrian hotel by Morgans Hotel Group on the Southbank in central London, UK.

The 359-bed Mondrian London features Morgans' in-house spa brand Agua. The facility was overseen by Jacqueline Kneebone, Morgans' regional director of spa and retail, who worked on everything from spa layout feasibility and curating menus after a detailed trend and market analysis to pre-opening and operational set-up.

The spa emulates the concept of Roman Baths, with a focus on creating a fun, social hub for visitors. The relaxation area boasts a large corner sofa and a Copper Hull Water Pool feature by Tom Dixon that was inspired by traditional Roman water vessels. Other communal spaces include two lounges, a hammam and two steamrooms. There are also six spacious treatment suites.



The Copper Hull Water Pool feature in the spa was designed by Tom Dixon

Products include niche brands such as House of Soveral by UK facialist Alexandra Soveral; Glam Glow mud; and Dr Jackson's Natural Products, as well as the spa brand Natura Bissé. They were chosen for the way they work on the senses and how they "improve health and revitalise the spirit".
Read more: http://lei.sr?a=e4T6b_S

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DIARY DATES

12-14 NOVEMBER 2014

Cosmoprof Asia

Hong Kong Convention & Exhibition Centre, Hong Kong

More than 2,100 companies exhibited at Cosmoprof Asia 2013. The Asian business-to-business trade show covers the spa, beauty, haircare, natural health, perfumery and cosmetic sectors.
www.cosmoprof-asia.com

18-19 NOVEMBER 2014

Spa Life UK

Center Parcs Woburn Forest, UK
Spa Life UK includes a CEO Summit for operators, a buyer/supplier forum and a one-day conference.
www.spa-life.co.uk

10-11 DECEMBER 2014

Spameeting Middle East

St Regis Hotel, Abu Dhabi, UAE
A two-day forum of face-to-face meetings between spa suppliers and buyers from the Middle Eastern, Indian Ocean and Russian regions.
<http://me.spameeting.com>

23-26 JANUARY 2015

Les Thermales

Carrousel du Louvre, Paris, France
Les Thermales, the French water and wellness show, has exhibits based on the thalassotherapy, thermal spa, balneotherapy, day spa and beauty sectors.
www.thermales.com

6-8 FEBRUARY 2015

BeautyPro Event

Molitor, Paris, France

This new spa and beauty exhibition, by the organisers of Mondial Spa et Beauté, will be held at the exclusive Molitor hotel in Paris. Each exhibitor will have their own mini spa room and 8,000-10,000 industry professionals are expected.
www.beautypro-event.com

19-21 FEBRUARY 2015

ForumPiscine

Bologna Fiera, Bologna, Italy
Now in its seventh year, ForumPiscine is a specialised exposition of pool systems.
www.forumpiscine.it



Male consumers are more likely to visit a spa with their partner or spouse according to the data

Thai spa industry research unveiled at WSWC 2014

Thai spa-goers visit facilities an average of seven times a year according to the 2014 *Spa Industry Study* which was revealed at the World Spa & Wellbeing Convention (WSWC) in Bangkok in September.

The study of 295 Thai spa consumers and 115 managers by Stenden Rangsit University shows that the future looks good too. "This year we see that spa consumers are very positive about their experience and would continue to visit and spend more in the upcoming months," says Stenden's research co-ordinator Prantik Bordoloi.

Eighty-three per cent of spa consumers in the survey said they were likely or very likely to visit a spa in the next 12 months; and 49 per cent of spa-goers expected to spend more than THB1,500 (US\$46, €36, £29) on average.

Bordoloi adds; "We also see this year that spa operators actually rank the expatriates and locals higher than tourists in terms of their importance [to business]."

The study was conducted in collaboration with the Thai Spa Association and is in its second year (see SB13/4 p86).

Read more: http://lel.sr?a=c5e9R4_N_S

First FRHI spa opens under Andrew Gibson's control

FRHI Hotels & Resort's Raffles Istanbul has launched on the European side of Istanbul, Turkey, at the heart of the new Zorlu Center – a high fashion, performance, fine food and arts bazaar.

The 181-bed hotel, with views over the Bosphorus, features a Raffles Spa – the first spa by FRHI to open under its new vice president of spa and wellness Andrew Gibson.

Gibson joined FRHI in January (see SB14/2 p26) and was formerly group director of spa for Mandarin Oriental. He told *Spa Business*: "There are big differences in the way Mandarin Oriental and FRHI open hotels, but both have a very professional approach and a mark of luxury that is outstanding."

The 2,300sq m (3,229sq ft) Raffles Spa comprises seven treatment rooms



The Organic Pharmacy and Gazelli Skincare have been chosen as the product houses

and two couples' suites in addition to two pools and three Turkish hammams. There are also male and female relaxation areas with saunas, steamrooms and whirlpools.

Read more: http://lel.sr?a=c5e5D_N_S

PERSONAL FITNESS DOESN'T NEED TO BE A GRIND



With the aim of providing a revolutionary workout experience, Matrix Fitness has supplied a full range of products for a newly-refurbished gym at a premier Oxfordshire venue

Client: **Bicester Hotel, Golf and Spa**
Supplier: **Matrix Fitness**

Nestling in 134 acres of stunning Oxfordshire countryside, Bicester Hotel, Golf and Spa is the perfect venue for leisure, business, and golf. The hotel's superior facilities include an exclusive health and fitness club overlooking the golf course, which has recently undergone a £300k transformation.

The spacious gym, open to overnight guests and members, now boasts a full range of high-end Matrix Fitness cardiovascular products including Ascent trainers, treadmills, ellipticals and cycles; all featuring Virtual Active for a revolutionary workout experience. Matrix has also installed the engaging MyRide system, enabling gym users to experience the closest thing to outdoor cycling without having to negotiate traffic or weather! The refurbishment extends to the site's strength offering too; with the introduction of customised products from the supplier's Ultra range.

Health club manager Peter Kerswell-Jensen said of the decision to invest in Matrix Fitness equipment:

"The reason we chose Matrix as our equipment manufacturer was largely due to the impressive design and the vast

The reason we chose Matrix was largely due to the impressive design and the vast services the equipment has to offer – our membership has been blown away

services the equipment has to offer. Our membership has been blown away by the Virtual Active software and further exercise capabilities of the machines. The asset management software enables us as a team to ensure our membership has the best maintained equipment possible, and makes the process of repair so much easier with the online reporting system.

"We have been really pleased with the outcome of the machines and the feedback from members only confirms how great this equipment is. They are much more interactive, enticing, and simple to use and have already started to have a positive impact. With regard to our membership it has for a long time sat at a steady balance, however since the install we have seen an increase in membership by three per cent over the last two months, and people are continuing to join."

Andy Loughray, head of national sales at Matrix Fitness, added:



■ The luxurious surroundings provide an ideal complement for the Matrix equipment at the Bicester Hotel, Golf and Spa's gym

"We are delighted to add Bicester Hotel, Golf and Spa to our premier installation portfolio. The venue is the perfect showcase for our high-end equipment, with the luxurious surroundings providing the ideal complement for our premium products."

The hotel's enviable range of facilities includes a magnificent golf course, dedicated yoga, dance, and indoor cycling studios, a luxury pool complex and spa, and four new floodlit tennis courts. After an intensive workout, guests can also benefit from a wealth of beauty and therapeutic treatments in the Forest of Wellbeing suite, and enjoy an exquisite dining experience in Grays Restaurant, or a light bite in the elegant contemporary bar and lounge area.

MATRIX
www.matrixfitness.co.uk

Spa Foresight™

What's coming down the track for the global spa and wellness industries? *Spa Business* examines the trends, technologies and strategies which will shape the future



Spa Foresight™ is published annually in the *Spa Business Handbook*

Top 20 predictions for 2015

1. Loneliness
2. Oil, gas – and solar
3. Edible environments
4. Taste sensations
5. Cellular health
6. Robot therapists
7. War zones
8. Fats & carbs
9. 3D product printing
10. Predicting purchasing
11. No front desk
12. Virtual trainer
13. Bad products
14. Over nourishment
15. Circadian aware
16. Microgyms
17. Gut health
18. Clean air and water
19. Facial recognition
20. Wellness cities



SHUTTERSTOCK.COM/ISNAPS

BAD FOR HEALTH

1. LONELINESS

The number of people living alone has increased by 80 per cent in the last 15 years, rising to 277 million globally in 2011 according to Euromonitor. While ageing populations have contributed to statistics, the 'cult of the individual' has also intensified.

Figures are the highest in Sweden, where 47 per cent of households only

have one person living in them, this is followed by the UK (34 per cent) and Japan (31 per cent).

Loneliness has dramatic ramifications for health – it can interfere with sleep, raise blood pressure, decrease immunity, increase depression, lower overall wellbeing and stimulate the production of cortisol. Lonely people

are twice as likely to die prematurely warn doctors.

With the power of touch being one of the most effective antidotes to isolation, spas are ideal hubs to tackle loneliness. Facilities could offer community outreach programmes targeting the most vulnerable and provide educational sessions on how to deal with it.



Baku: follow the oil to find growth

GLOBAL HOTSPOTS

2. OIL, GAS – AND SOLAR

Identifying hotspots very early on enables operators to unlock new markets for growth, by acquiring land and property and forming local partnerships to underpin expansion.

Spa Foresight™ is tracking emerging economies where wealth is based on the production of energy – oil and gas in the short-term – but longer-term we expect this to broaden out to include solar power.

The wealth generated by the harvesting of these natural resources is creating

exciting opportunities for development in emerging nations such as Kazakhstan, Nigeria, Algeria, Angola and Azerbaijan, which have vast oil reserves and Uzbekistan and Turkmenistan which have gas.

Opportunities for spa development will emerge once better infrastructure is in place and this oil and gas wealth combines with more stable political situations.

As solar gains market share, we'll track the winners in that too. These are just as likely to be in the developed world. For example, in Australia solar has reached a tipping point where it's cheaper than coal.



SHUTTERSTOCK.COM / KATERINA PERKOVSKAYA

Growing and spa are a natural fit. The message is, if you can make it edible then do so

GROWING INTEREST

3. EDIBLE ENVIRONMENTS

Going to the spa to get your hands in the soil and do some gardening may seem an unlikely idea, but we think growing and spa are natural bedfellows and predict this trend will take off.

Growing is the new rock and roll, with horticulture degrees at full capacity, foraging becoming a career choice and communities being built around brands like *Modern Farmer*, the New York-based magazine which is attracting a crowd who love to grow and eat.

In the restaurant sector, chefs now view the soil as the starting point for their craft, with some investing in their own farms, while new resort Kittitian Hills in St Kitts will have an edible golf course.

Edible parks and ponds are also becoming more popular in response to the drive to make communities more local, natural and sustainable – the message is, if you can make it edible then do so.

We expect to see spas embracing the Grower movement in a multitude of

ways, such as adding rooftop gardens and opening up space for growing.

Working in the gardens and with the soil – with the added benefits associated with earthing – could be an enjoyable part of the spa experience. This is especially the case for those who live in cities. Being able to graze on the landscape while enjoying the outdoors is a nourishing and healing pleasure that fits perfectly with the spa ethos and chimes with the growing interest in ‘food as medicine’.

PLAYING WITH FOOD

4. TASTE SENSATIONS

Living Food – a concept from biology and robotics student Minsu Kim – proposes the addition of live organisms to fine dining. She foresees a time where we move beyond the oyster to where “a vegetable plays with your fork, while noodles tickle your tongue as you eat them,” and plates of food become living, pulsating things.

The colour, shape, weight and size of cutlery and crockery also affects taste. Researchers from Oxford University, UK have found that food tastes saltier if eaten with a knife and feels denser and more expensive if a light plastic spoon is used. Drinks served in cold-coloured glasses seem to quench the thirst more.



Live organisms are incorporated into fine dining in Minsu Kim's Living Food concept



PHOTOS: WWW.MINSUKIM.NET

Cellular health: this subtle element of wellbeing is unseen and rarely researched, so education to raise awareness will be the first step

STRIKING A BALANCE

5. CELLULAR HEALTH

We anticipate increasing awareness of the importance of cellular health – something few people have any knowledge of.

Many of the systems which run our bodies at a cellular level work through tensions between opposites and the balance between them determines our health.

For example, the health of the gut – which underpins the immune system – relies on the balance between fungi and bacteria. If either dominate, our health is undermined: consume too much sugar or yeast and fungus flourishes, which leads to disorders such as candida, athlete's foot and thrush.

The cellular pump, which keeps our cells clean and our blood pressure healthy, relies on the correct balance between



SHUTTERSTOCK.COM/WAREEN GOLDSWAIN

Good cellular health is the foundation of wellbeing, but few people are aware of this

sodium and potassium in the body. Get the balance wrong and the result will be disease and high blood pressure.

A wide range of health factors are reliant on balance – exercise and rest, acid and alkali, oxygen and carbon dioxide. Good balance means excellent cellular health and a greater likelihood of freedom from disease.

We expect to see a more widespread recognition of the importance of good cellular health, its role in the fundamental underpinning of wellbeing and of its importance as the ultimate tool in the prevention of disease.

This subtle element of health is unseen and rarely researched, so education to raise awareness will be the first step.

AUTOMATION

6. ROBOT THERAPISTS

The ability to perceive the minds of others is emerging in robots and the field continues to develop and evolve.

We predict the spa and wellness industry will eventually employ robot therapists to carry out some, if not all work.

The world of work is changing fast – researchers at the University of Oxford in the UK have just published a report, *The Future of Employment*, which says 45 per cent of jobs currently done by humans will be computerised in 20 years. The coming of robot workers will overlap with this, as businesses strive to reduce labour costs and increase profitability.

Robots can already scan and appraise materials and interact with them appropriately, so some of the elements which are required for the leap into delivering a treatment are already in existence. Unlike humans, robots can be programmed



The advent of robot therapists will enable the delivery of highly technical treatments

(and reprogrammed) quickly to follow highly technical and complex procedures – imagine the comprehensive spa menus and levels of customisation which would be possible if treatments were delivered by robot instead of human? Some may prefer to be treated by robot, as it removes the embarrassment they feel at being naked in front of another person.

Robots are capable of making connections between data and basing actions on the latest research because they can upload, process and analyse vast quantities of information to reach a diagnosis.

As an example, IBM pitted its most powerful computer – Watson – against world leading medics in a diagnostic test for cancer and Watson won hands down. IBM says 20 per cent of all medical diagnoses in the US are erroneous, leading to incorrect treatment. We imagine a time when healing modalities are prescribed and delivered effectively by robot.

■ More about IBM Watson:

<http://lel.sr?pa=4boF8> and

<http://lel.sr?pa=k7v7y>

■ Oxford University report:

<http://lel.sr?pa=r3FoV>

A NEW PERSPECTIVE

7. WAR ZONES

Although we're living in the most peaceful century in history, the last seven years has shown a notable deterioration in levels of peace, according to *The Global Peace Index* from The Institute for Economics and Peace (IEP).

Since 2008, 111 countries have deteriorated in levels of peace, it found, while only 51 have increased and the world's become less peaceful due to a rise in terrorist activity, the number of conflicts fought and people displaced. The global economic impact of violence reached US\$9.8tn last year.

We believe there's a case for the spa industry to track and respond to war zones for a number of important reasons.



SHUTTERSTOCK.COM/JOHN BULL

Vietnam, a former war zone, now has a booming spa sector

Firstly, there are opportunities in rebuilding, as conflicts draw to a close and major infrastructure and investment recommence. It's a long-term play, but can prove lucrative. Former war zones such as Vietnam are now booming as spa and resort destinations.

Secondly, where spa developments are underway or established, businesses can be threatened by civil unrest, so operators, developers and investors

need a systematic way of assessing and responding to this risk to protect assets.

Thirdly, and most importantly, the healing ethos of spa and wholesome physical touch can make a huge difference in areas of conflict.

Overall, tracking war zones gives a clear indication of where threats and opportunities lie for the spa industry.

■ IEP report:

<http://lel.sr?pa=y8Y6G>



SHUTTERSTOCK.COM/MATISIA BREEN

THE NEW SUPERFOODS

8. FATS & CARBS

Misinformation about fats and carbohydrates has led to many excluding them from their diet.

However, we expect to see this change, as people become better educated in holistic nutrition.

In his book *Fats that Heal, Fats that Kill*, Udo Erasmus makes the case for consuming the correct fatty acids to prevent a wide range of serious health disorders. While carbohydrates are necessary to help functions such as nerve health.

Spas are perfectly placed to educate customers on these issues and to include the correct fats and carbs on the menu.



SHUTTERSTOCK.COM/NOLOTOFO

3D printing – product houses beware

ON-SITE AND ON-DEMAND

9. 3D PRODUCT PRINTING

The therapist goes to get a bottle of body scrub and finds someone took the last one. A disaster? Today perhaps, but not for much longer. Soon it will be possible to 3D print more to order on-site.

The implications are huge and will change both the economics of spa operations and the relationship between suppliers and operators.

3D printing products on-site will mean

they're fresher, so less preservatives will be needed, shipping costs will be lower and storage and packaging will be reduced.

Product companies which gear up for this hugely disruptive trend will be able to control the intellectual property rights to their own formulations. But those that sit back and do nothing will find that – as with the drug industry – there will be competitors who adapt

their formulae and create generic versions.

The power of the brand and the control which suppliers exert over the infrastructure will be key. If a product house creates a 3D printing option for clients whereby they have a licence to print a branded product for use in treatments, then they will retain market share, but if this isn't done, then they could potentially lose their business.



SHUTTERSTOCK.COM/MIHAL SIMONIA

Weather impacts on consumer buying patterns

WEATHER CHANNEL

10. PREDICTING PURCHASING

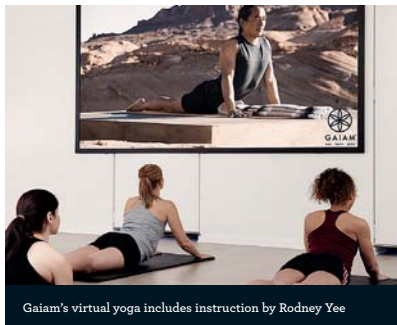
In the US, the Weather Channel has rebranded as the Weather Company – a business with over 75 years' of weather data which it's using to predict not only the weather, but when people are more likely to buy certain goods. We think operators will increasingly use big data like this to understand customer behaviour and how to optimise income.

WELCOMING GUESTS

11. NO FRONT DESK

Cloud software enables operators to remove the front desk and instead welcome guests with a tablet computer and a personal greeting at check-in.

Spas and hotels are experimenting with tablet check-ins, while some restaurants are trialling app payments which allow customers to avoid a wait for their bill.



Gaiam's virtual yoga includes instruction by Rodney Yee

ACCESS TO EXPERTS

12. VIRTUAL TRAINER

Given their ability to generate value from underutilised space, virtual exercise classes are likely to be picked up by spas. They're already very popular with top fitness operators such as GoodLife Fitness, Virgin Active and Anytime Fitness.

Systems consist of a screen, projector and a computer connected to the internet that runs classes and installation starts at US\$3,000 (£2,210, £1,790).

Operators can pre-schedule classes or let customers choose sessions on-demand.

They enable facilities to offer world-class instruction and a huge variety of trainers. Gaiam provides yoga sessions by Rodney Yee. Other major brands such as Les Mills and Zumba have also entered the virtual arena which suggests that it's on the brink of rapid growth.

LAWSUITS ON THE HORIZON

13. BAD PRODUCTS

Rub garlic on your feet and soon you can smell it on your breath – such is the amazing absorptive power of the skin.

With such a mainline into the circulatory and lymphatic systems, the skin is a miracle – and its role in good health cannot be underestimated.

Skin can't discriminate between beneficial and harmful substances and it will absorb everything it's exposed to – for good or ill – creams, oils, treatments and potions included.

As global product houses fight for market share, they produce endless streams of new and ever more 'efficacious' product lines which claim to reverse ageing and variously firm, lighten and rejuvenate the skin.

Where these products are ineffective, there's less cause for concern, because this limits the potential for damage. However, where they have active ingredients, their use – especially when randomly combined – amounts to a giant experiment at the expense of the consumer and no one can accurately predict the outcome.

Ethical suppliers factor this into their R&D and ensure products are harmless, but some compromise for commercial gain and we expect health-related issues triggered by these products to lead to a backlash from consumers. We may even see lawsuits being brought by consumers as compensation for conditions related to product use.

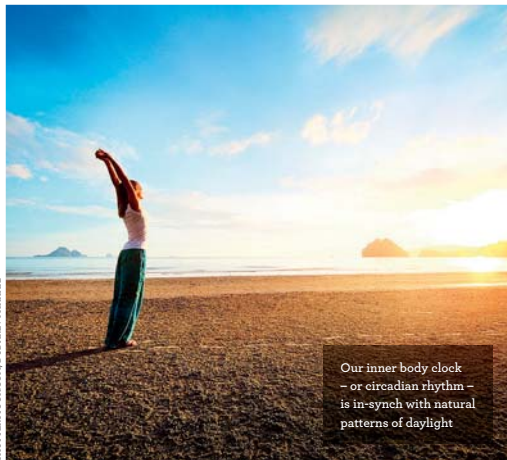


Supplements are big business, but too many can be harmful

TOO MUCH OF A GOOD THING

14. OVER NOURISHMENT

Millions of people the world over take vitamin supplements for any number of reasons – to boost their health, give them better skin or even raise their sex drive. While some people may benefit from specific supplementation, scientists are warning that taking extra vitamins without supervision could be a waste of money and may even be harmful. High doses of vitamin A, for example, can be linked to osteoporosis.



Our inner body clock – or circadian rhythm – is in-synch with natural patterns of daylight

SETTING THE RHYTHM

15. CIRCADIAN AWARE

Organising schedules around the body's natural clocks – our circadian rhythms – can improve mental alertness and enhance the immune system. Yet when these rhythms are disrupted by work patterns or even artificial light, our inner clocks are thrown.

We see spas creating circadian friendly environments by installing 'healthy lights' which mimic the wavelengths and natural patterns of daylight that our biological rhythms are in-synch with.

We also see spas becoming more mindful of the timing of treatments. Is there an optimum time to offer a more relaxing or energising massage? Many skin functions are circadian rhythmic – oil production is twice as high at noon and its temperature is higher in the evening. Of course, everyone has their own natural rhythm, but these guidelines could be used as a starting point to tailor facials.



A microgym by Body Bike

SPECIALIST FITNESS

16. MICROGYMS

Microgyms – centres specialising in just one area of fitness such as cycling or functional training – are taking the health club market by storm, creating a new breed of exerciser which spas can also target.

The users are becoming more targeted with each club they join – wanting a specific type of yoga, group cycling or equipment.

Savvy spa operators will monitor the microgym movement and emulate the experience by putting on themed workouts with special guest instructors. We also expect to see partnerships forming between microgym and spa owners.



Austria's Original FX Mayr Health Center focuses on gut health

THE SECOND BRAIN

17. GUT HEALTH

A growing body of science is revealing just how essential our digestion is to overall physical and mental wellbeing.

The 9m long enteric nervous system is referred to as 'the second brain' because it contains around half a billion nerve endings – more than in the spinal cord. It not only controls

digestion but exerts a powerful effect on hunger and appetite hormones like ghrelin and CCK, as well as immunity and mood. It also manufactures around 50 per cent of the feel-good hormones serotonin and dopamine.

The FX Mayr cure is a renowned treatment for digestion in Austria,

but is less well known internationally. It's based on a restricted calorie, low starch regime, Epsom salts to cleanse the bowel and abdominal massage.

We predict extreme growth in the number of spas offering gut health programmes as research backs up its importance in underpinning wellness.

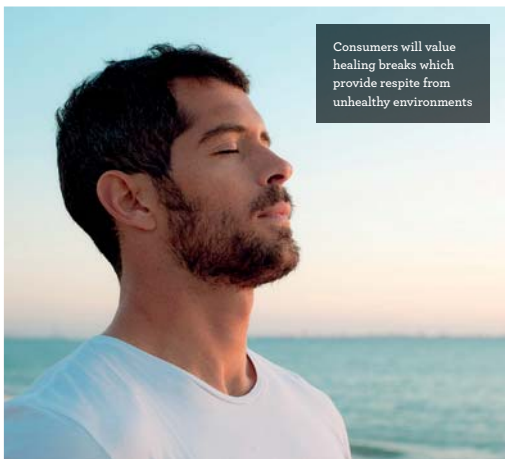
THE BASICS ARE NOW A USP

18. CLEAR AIR AND WATER

Breathing clean air and drinking and bathing in clean water are three fundamentals of health, but for some who live in toxic places, there's no respite from pollution.

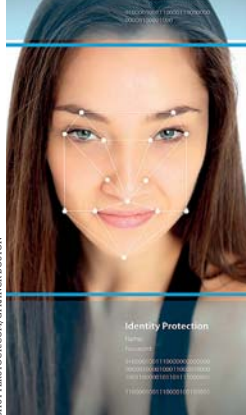
Spas that offer access to clean air and water will find that this USP is increasingly sought by consumers and we foresee a new trend emerging around the provision of both of these elements, by either natural or artificial means.

We expect spas with access to clean air and water to devise healing programmes, while those located in polluted places, will have the opportunity to offer special rooms where guests can enjoy breathing clean air and bathing in pure water. This will extend to concepts such as sensory rooms with 360 degree-screens where it will be possible to simulate standing on a beach in a wood or lavender field.



Consumers will value healing breaks which provide respite from unhealthy environments

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New tech shows how guests really feel

TUNING IN OR JUST CREEPY?

19. FACIAL RECOGNITION

Understanding consumers' true feelings and motivations has been the concern of neuromarketers for some years: what we say we want and what we really want are often two completely different – and sometimes contradictory – things.

Now, facial gesture recognition and profiling software is coming to

market which is enabling retailers to identify mood and respond accordingly.

A coffee brand recently conducted a PR stunt by installing a vending machine at a Johannesburg airport: travellers got a free cup when the facial recognition software detected them yawning.

We expect hospitality companies such as spas

and hotels to deploy facial-recognition software to assess customers' moods before, after and even during visits.

Are they relaxed and content, or are they disengaged or annoyed? The software could give valuable insight into guest experiences and, in turn, be used to improve services.

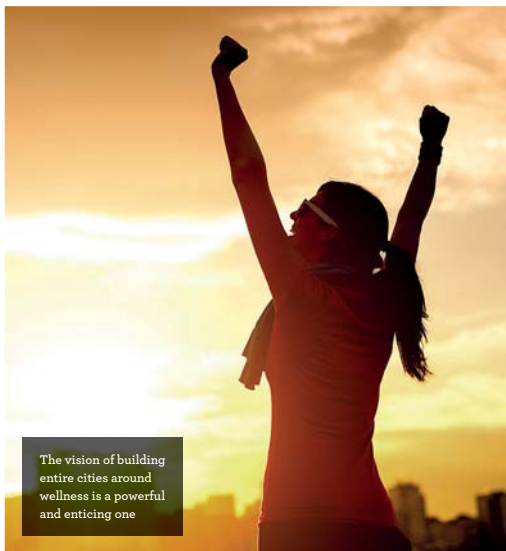
HUBS FOR HEALTH

20. WELLNESS CITIES

Spas are already beginning to embrace wellness, but could this be taken further where we'll see the emergence of wellness cities?

Locales could become hubs for wellbeing where everything has been designed (or redesigned) with health in mind: from the green spaces outside and fresh air we breathe to the buildings which incorporate circadian lighting and water filtration systems. Spas offering a multitude of wellness services would also feature heavily.

The vision of building entire cities around wellness is a powerful one which most people can relate to and find compelling and attractive. And although the idea of wellness environments is not new, we're approaching a time when the concept will reach tipping point and enter the mainstream.



The vision of building entire cities around wellness is a powerful and enticing one

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spa business uniting the world of wellness



Jeisman joined Alila in 2006 to create the group's in-house spa brand and has watched the concept flourish over the years

STEVE JEISMAN

Alila Hotels & Resorts prides itself on innovation and refuses to follow the crowd. But as business grows, including a new partnership with US hotel operator Commune, how will it keep its edge? Katie Barnes talks to the group director of spas and development to find out



There are 10 boutique properties in the Alila portfolio and 19 more are due to open in the next four years. Nearly all of them have spas



“We don’t follow suit, we create, we develop, we’re artisans and yes, we see ourselves as a leader in the field,” says Steve Jeisman, the group director of spas and development for Alila Hotels & Resorts.

As an example, Jeisman is hiring PR people as spa managers and considers therapist wellbeing a key performance indicator. All of Alila’s treatments are crafted in-house and its proud to have

created all of its own spa products and villa amenities – 60 in total – which can be purchased via a dedicated e-commerce platform, shopalila.com.

Alila means surprise in Sanskrit and unique touches are part of its ethos. The Indonesian company launched in 2001 and has been growing slowly, but surely. Today, it has 10 boutique properties, nine with spas, and 19 more in the pipeline (see p44).

In a strategic move this May, Alila also announced a partnership with Commune

Hotels & Resorts, which has 36 sites across the US plus 10 others in development.

As the pace picks up, we talk to Jeisman about how he first created the Spa Alila brand, what the tie-up with Commune means and what other innovations we can expect.

The spa choice

Attention to detail was something Jeisman learned early on in his career. Aged 22, he found himself running a small boutique hotel in his hometown of Perth, Australia ▶

Alila Hotels & Resorts

CURRENT PORTFOLIO

Alila Villas – Crafted Luxury

The Crafted Luxury brand by Alila has been created for the high-end, ultra-luxe market with villas ranging from US\$550-US\$10,000 (€439-€7,970, £344-£6,260) a night

- Alila Villas Soori, Bali, Indonesia
- Alila Villas Uluwatu, Bali, Indonesia
- The Soori Estate, Bali, Indonesia
- Alila Purnama (luxury ship)

Alila – Lifestyle Collection

Alila's Lifestyle Collection concept is more geared towards resort and city hotels. The properties are 'stylish and relaxing' and room rates range from US\$100-US\$500 (€80-€400, £63-£313) a night

- Alila Bangalore, India
- Alila Diwa Goa (including The Diwa Club), India
- Alila Jakarta, Indonesia



- Alila Manggis (including Villa Idanna), Bali, Indonesia
- Alila Ubud, Bali, Indonesia
- Keman Icon, Jakarta, Bali, Indonesia
- Alila Jabal Akhdar, Oman

▲ The luxury live-aboard Alila Purnama can accommodate up to 10 people and comes with its own spa therapist. It has three decks and has been handcrafted to replicate a traditional Indonesian pinisi ship

To do things properly, at the level we wish, you have to have your own brand...
What we do isn't rocket science, but it's actually difficult to do it well

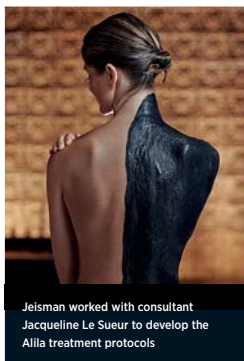
► where "things were done properly," he recalls. "It had an old-school Italian swagger where even the little handle on the coffee cup was turned out 90 degrees."

His foray into spa came in 2002 when The Villas, Seminyak, the Balinese property he was managing, opened one of the largest spas in the country with 27 treatment rooms. The native Australian says: "I grew up in competitive sports with a deep interest in sports and health... so when the owner decided to open up Prana Spa it was something of great interest."

"We employed some fantastic consultants such as Bryan Hoare and Judy Chapman to launch Prana Spa and it was really good, creative fun! Once it opened, I got to know my way around the spa industry a little bit and focused on knowing the spa business inside and out."

A year on, Chill, a smaller spa for aesthetic and express treatments which was ahead of its time, was introduced.

These experiences proved pivotal when Jeisman was approached by Alila in 2006. "They were looking for someone to manage one of their properties, at the same



Jeisman worked with consultant Jacqueline Le Sueur to develop the Alila treatment protocols

time though, they were looking to develop their own spa concept as they were using Mandara Spa as their third party," he says. "We discussed both roles and I took 10 minutes of private deliberation. I was sent a spa contract a week later."

Honing the brand

More than eight years on, it's clear Jeisman still has a passion for spa even though he jokes that "I'll be coming up for long-service soon!" He describes his role as "managing a complete turnkey solution from A to Z": an accurate summation given that he handles everything from concept briefs, working with architects and FF&E to recruitment, revenue management and ongoing audits.

He was also responsible for developing the original Spa Alila concept, although initially converting the Mandara Spas was a baptism of fire he recalls: "We were putting together everything from furniture plans and therapist's uniforms to forecasts and basically turning it around overnight."

He's been honing the brand ever since. "To do things properly, at the level we wish, you have to have your own brand identity," he says. And two obvious examples of this at Alila are its treatment protocols and bespoke products.

"All the treatments we trialled within our competitive set were stock standard and generic," says Jeisman who brought



Service is a priority and up to 25 per cent of guests make a spa visit twice during their stay at an Alila property, spending 30 per cent more the second time round



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Alila Seminyak in Bali will open by mid 2015 with a Spa Alila featuring eight double treatment rooms

I want my spa managers to be leaders on the floor: if they're spending any more than 15 per cent of their time back of house we have a problem

in consultant Jacqueline Le Sueur to help develop the therapies. "We wanted to stand out. In Bali, there's a saying known as 'sayang sayang' which means to nurture and we added that dynamic to take guests down to another level of relaxation."

In practice, this translates into a series of graceful, soft touches that therapists use to maintain contact with the guest and help the massage flow. As an added extra, guests are left in the room undisturbed if they fall asleep – "there's no big bong or face mist – we let them go at their own pace," he says.

Products are also made according to the Alila brief which includes a strict 100 per cent natural policy. "We begin by looking at the results we want," explains Jeisman. "So if it's a detox or cellulite treatment, we'd look at oils and masks with coconut or coffee. We'd then make it attractive to the marketplace – does it look good? is it easy to use? does it smell nice?"

In Indonesia, it partners with Sensatia Botanicals to make the products and Jeisman says the business has blossomed as Alila's demands have increased. Altogether there are 60 Alila Living items including 18 villa amenities which cover everything from sun creams to mosquito repellent.

For those who want to buy into the Alila lifestyle, the products can be bought at

shopalila.com. For the moment there's no intention of opening up concept stores despite requests from America, the UK and even Kuwait. "What we do isn't rocket science, but it's actually difficult to do it well... and at this stage we want to keep it in-house," says Jeisman.

New approach to staffing

With all this talk of concepts, treatments and products, you'd be forgiven for thinking that creativity and development is the main focus for Jeisman. Not so. There's also the running of the nine Spa Alilas (and counting) – for which he also thinks outside the box.

"I've shifted my employment scope: I'm not looking for spa managers any more, I'm looking for PR, marketing and sales people," he replies when questioned about staffing challenges. "At the end of the day, a talented spa supervisor can run the day to day operations. I want my spa managers to be the leaders on the floor: if they're spending any more than 15 per cent of their time back of house we have a problem. PR people can talk to guests, be the face of the business and sell treatments and retail – because if you miss out on selling additional treatment time or product to just one guest that's money out the door."

Alila Hotels & Resorts

DEVELOPMENT PIPELINE

2015

- Alila Seminyak, Bali, Indonesia
- Alila SCBD, Jakarta, Indonesia
- Alila Solo, Surakarta, Indonesia
- Alila Anji, Zhejiang, China
- Alila Xiangshuiwan, Hainan, China

2016

- Alila Villas Koh Russey, Cambodia
- Alila Villas Nuishoushan, Nanjing, China
- Alila Villas Bintan, Indonesia
- Alila Tianxi Lake, Zhejiang, China
- Alila Yangshuo, Guilin, China
- Alila Fort Bishangarh, Jaipur, India
- Alila Bangsar, Kuala Lumpur, Malaysia

2017

- Alila Villas Hangzhou, China
- Alila Dalit Bay, Sabah, Borneo, Malaysia
- Alila Lishui, Zhejiang, China
- Alila Yingde, Guangdong, China
- Alila Taihu, Suzhou, China

2018

- Alila Huangshan, China
- Alila Tangshan, Nanjing, China

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► Every treatment at Alila is detailed in a training manual to ensure the brand essence is maintained

► It's a task Jeisman will be trying for new openings which are proving the most difficult to recruit for. "It's getting harder every year as salaries keep going up by 20 per cent [annually], and it's still not enough to stop them from going overseas once they've got the experience."

It's not such a serious problem for the more established spas, he says, where staff turnover has been a highly commendable 5 per cent over the last eight years. He puts this down to localisation, saying that "at some properties therapists all come from the local village and they don't really want to move anywhere else."

Important KPIs

Perhaps another reason why staff turnover is low is because the welfare of therapists is considered one of the most important key performance indicators (KPIs) at Alila. "The health and wellbeing of the therapist has such a dramatic impact on our business and how we look after guests," explains Jeisman. "The number two priority is the service and making sure core standards are met. We know that leaving 30 minutes between treatments [for guests to sleep] will effect our revenue, but it's about brand standards."

And it seems that not compromising in these areas is paying off. "The number of guests who visit a spa twice in their stay can be as high as 25 per cent and believe it or not they spend 30 per cent more than the first time round."



▲ There are 60 different spa and amenity products under the Alila Living brand



Of course, Jeisman keeps an eye on the money too and reveals that the spas at Alila account for 5 to 10 per cent of the company's overall revenue. But even then his approach to revenue management is slightly different. "I'm not too concerned if spas don't reach their bottom line budget," he says. "If they set their sights on meeting the average spend per guest and capture rate they've done a good job." His reasoning is that these KPIs give more of a sense of achievement than budget forecasts when hotel occupancy is low.

To monitor progress, Jeisman explains that spa managers produce a dashboard which has a mix of financial and marketing stats to show exactly where revenue streams come from and where they need to go. If targets aren't met, one of the first things they look at is capture rate per nationality. He explains: "Let's say the Japanese market makes up 30 per cent of hotel occupancy but accounts for only 2-3 per cent of spa revenue. We look at why that market isn't coming to the spa – they might have ties to different spas – and then

▲ Alila monitors the wellbeing of therapists because their health has a dramatic impact on all aspects of the business

we create a marketing plan to resolve that issue. So we look at everything in detail."

Investment and growth

In the next four years, Alila is planning to open 19 more properties (see p44) and all except for one will have a spa. As the company grows, the majority of new developments will be based on management agreements, apart from new properties in Indonesia which Alila will also own.

Jeisman confirms that there are no plans at present to offer spa management services to third-party operators, adding that as he's the only employee at a spa director level he's not short of work.

However, things will undoubtedly get busier following a new partnership with US-based operator Commune Hotels & Resorts which was announced in May. The alliance is a result of Geolo Capital, the private equity firm that owns Commune, ►



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We need to decide whether we're going down the wellness path... we're trying to understand public perceptions of it and how far we go

► acquiring an interest in Alila. Previously, Geolo was an investor in Mandara Spa Asia which was founded by Mark Edleson – now president of Alila – before it was sold to Steiner Leisure in 2001.

Hotel management company Commune has a portfolio of 36 boutique hotels across the US under the Joie de Vivre, Thompson and Tommie brands, with another 10 developments in the pipeline.

Both companies will benefit and gain access to each other's brands, sales, marketing and revenue management channels – Commune in Asia and Alila in the US – to gain wider exposure and distribution internationally.

How the deal impacts on development remains to be seen says Jeisman. "It's yet to be determined when or even if we start co-branding and when the first joint developments will begin. We're only just starting to look at that."

Whatever the move, protecting the Spa Alila identity will be a priority – "Mass developed spas have the potential to lose their charm and brand essence, so we'll be very careful when discussing expansion," says Jeisman. To avoid this, all spas will continue to align with Alila's core values and incorporate its signature therapeutic experiences and the Alila Living products. There is, however, flexibility to develop treatments to suit market demands, such as traditional Chinese massage and ayurveda as long they're 'honest', authentic and of high quality.

There's also ongoing auditing to ensure the spas are on-message and having developed the Spa Alila concept from scratch this comes as second nature to Jeisman. "It's easy for me to audit everything from finance and marketing to the treatment, but if they need attention I send our trainers, as I'm definitely not a therapist, I just know what our standard is."

Tackling wellness

While the long-term vision for Alila is mapped out in its development pipeline, the next immediate step is to work out whether or not to incorporate wellness into the offering. "We're at a crossroads where we need to decide whether we're going down the wellness path," says Jeisman. "It's a term that's very loosely



▲ Jeisman (third from left) says the Alila corporate team are easygoing and innovative

used right now and we're trying to understand public perceptions of it, what that means for us and how far we go.

"Do we go purely for a well-rounded natural offer combining our 100 per cent natural products and therapies with yoga, healthy food and lifestyle consultations and guidance? Or do we partner with a third party to introduce aesthetic services, machinery and injectables as a one-stop-shop solution?"

Working on new ideas such as this is a process Jeisman particularly enjoys. "We've got a great corporate team, they're easygoing, innovative people. We get to create our own development guidelines and it almost feels as though it's your own business. It's quite funny, my wife actually said to me yesterday that she'd been to Alila Villa Soori and said that it 'had you written all over it'. Other people have said 'that's you – a little bit edgy' after reading the menu or product descriptions too."

He concludes: "It's easy to be passionate when it's something you do yourself. And I love what I do. It's an interesting and exciting time for us." ●



Katie Barnes is the managing editor of *Spa Business* magazine
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Favourites

BOOK: *The Alchemist* by Paulo Coelho. It's such a iconic book that's always stuck with me

FILM: *Good Will Hunting*

SEASON: Tropical wet seasons which have calm sunny mornings with dark variable afternoons

SPA: At home in Bali, under the frangipani tree in my back garden with Pak Wayan from the village. My mind rarely switches off from work mode when inside a spa, so this is where I truly decompress. The therapies at The Farm in the Philippines are also outstanding

SAYING: Life is not about how many breaths you take, but how many moments take your breath away

FOOD: Thai and Javanese

TREATMENT: Bare foot shiatsu or deep tissue

WHO YOU ADMIRE: My mother, Vicki. The nicest person I've ever had the pleasure of knowing. Most mums are hard to beat when it comes to admiration



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Ask an expert

FASTING

Can fasting be safely offered at spas and, if so, what systems should be put in place to ensure success?

Fasting – abstaining from solid food for short or prolonged periods – has become a fashionable practice in recent years. Many spas now offer dedicated juice fasts and there's been a huge growth in popularity of at-home fasting plans like the 5:2 protocol where you eat for five days and semi-fast for two each week.

Fasting, of course, has been practised in different cultures and religions for thousands of years, recognised for both its physical and spiritual benefits. And as scientific knowledge advances, the world is learning more about how effective even short periods of fasting can be for longer-term health. Benefits include normalisation of weight, blood pressure and cholesterol, increased protection against Alzheimer's and diabetes, and even, some experts believe, a lengthened life span.

A new study by researchers at the University of Southern California has shown that total fasting for as little as two days was enough to trigger regeneration in the immune system, helping the body to fight infection – and we take a closer look at findings on page 116. Such effects could be of help to the elderly who have decreased immunity as well as cancer patients whose immune systems have been damaged by chemotherapy.

But should fasting retreats be the domain of specialised facilities like medical spas, with a highly trained team of experts on hand, or can it be safely offered as a restorative programme at spa resorts?



Many spas, and clinics such as Buchinger (above), already have the right natural environment to support fasting regimes

The beautiful and natural setting of many spas and resorts will certainly be conducive to the process of fasting. The long-established Buchinger fasting clinics in Spain and Germany (see opposite), which have a luxurious, spa-like, setting are testimony to this.

For those facilities that lack the on-site medical expertise of specialist facilities like Buchinger, programmes based around the 5:2 protocol – or 'fasting lite' if you like – are proving to be a more attractive and accessible option for both spa operators and their guests.

Whatever the wellness facility, customers must be carefully assessed for their suitability to the programme, provided with a transition period into the fast and a safe re-feeding period post-fast.

The consensus among most experts appears to be that total abstinence from food is both unnecessary and highly unattractive to participants. Those attending a high-quality spa will be expecting more for their fees than just water.

The Buchinger clinics, and most other fasting facilities, offer raw vegetable and fruit juices, broths and herbal teas as part of the fast. In fact, many experts agree that the addition of such nutrients only serve to enhance, not detract, from the results.

Many spas already have the right natural environment and supporting therapies (lymph drainage massage, body scrubs, meditation, etc) to complement a fasting programme. But which fasting model should they adopt and what support and expertise do they need to have to deliver it? We ask the experts for their advice on the matter.



Julie Cramer is a health, hospitality and travel journalist
Email: juliecramer@me.com

Technically a fasting programme would be nothing but water, but it can include food, raw juices and broths depending on the goals and condition of the person.

The main benefit is that it gives the body a chance to clean itself out. If done well, the body will be able to alkalise itself (most of us are overly acidic) which helps get rid of aches, pains and that foggy brain feeling.

I recommend seven to 10 days maximum for a fast. If you know how fasting works on your body, longer is possible, but I'd rather people repeated it more frequently than do it for excessively long periods.

For regular fasting programmes, spas need a great nutritionist or naturopath to orientate and monitor clients, and nurses on standby for any issues, such as side effects or withdrawal symptoms. I definitely don't recommend putting in fasting programmes with no oversight, even though it's basically safe and easy, because people will always manage to do the wrong thing to excess.

Be flexible with your programme. Food costs are nothing, so don't refuse requests



Jeff Nieuwenhuizen

Naturopathic practitioner

for food unnecessarily. Ensure F&B staff all get to try the fast and train them in what it is, why people do it and how to encourage them, and to flag up problems to the key people monitoring guests' progress.

After a three- to four-day adjustment period, when people lose the caffeine withdrawal headache and hunger, most people start to feel great. They feel lighter, think clearer, realise they have a freedom from food and more time in the day as they're not slithering about digesting.

Fasting ideally is a stepping stone to feeling better, which needs to be continued on through a great regular diet, rather than bingeing and going back to fasting again.

The worst misconception about short-term fasting is that it helps weight loss, and if you promote it as such your guests will only be disappointed. In detox/fasting,

we want to lower metabolism, whereas in weight loss we want to maximise it. So to be successful, detox/fasting needs to do the opposite to the body than what we want to achieve with weight loss. Trying to achieve both these goals during a week-long retreat is physiologically impractical.

I think fasting will continue to grow in popularity and become more accessible, especially at medical centres. In Thailand there's been a big move from the medical profession to offer these kind of programmes that used to be the domain of complementary therapy practitioners.

Nieuwenhuizen has been running wellness programmes in Asia for over 20 years. He specialises in nutrition and customised supplement therapy. Details: www.thewellnessdirector.com



I think fasting will continue to grow in popularity and become more accessible, especially at medical centres. In Thailand there's been a big move from the medical profession to offer these kinds of programmes



Fasting is one of the only scientifically-proven ways to live longer and possibly without associated age-related diseases too.

When you stop absorbing food through your digestive system, the body switches to the consumption of its own reserves, mostly fats. The cells enter a self-repair mode, which when taken care of properly – with a balance between exercise, rest and self-reflection – can lead to positive metabolic and neuro-hormonal regeneration, as well as mood-enhancing effects.

Small amounts of juices and broths make the fasting experience more pleasant and easy to adhere to, as well as providing extra vitamins and minerals. The positive effects don't seem diminished when compared to water fasting, but wellbeing and compliance are enhanced.

At Buchinger, the doctor decides with the client if fasting is needed or if a supplemented fasting or a calorie-restricted, plant-based, organic diet is better.



Françoise Wilhelmi de Toledo

Managing director and medical director,
Buchinger Wilhelmi Clinics, Germany and Spain

Clients must be healthy physically and emotionally to be able to fast [for short periods] without medical supervision. If they're under any drug treatment it's mandatory to be under the guidance of a physician specialised in fasting, to adapt the dosages accordingly.

We offer a whole fasting process; a smooth transition of two to three days of fasting, and a progressive refeeding period of three to four days. Our packages are 10 days, two weeks, or three weeks and 5-10 per cent of our guests stay longer.

Guests are given the opportunity to learn how to cook and eat differently, how to relax and which exercise suits them best. Mindfulness meditation is also offered.

We train our staff constantly. All the therapists have to fast themselves at least once when they start their jobs. Most of them do it regularly.

To enter a totally protected mode of fasting, a specialised facility with professional guidance is the right place to go. You need a medical structure, but also beautiful natural surroundings and your staff must radiate both professionalism and a special, loving spirit.

The Buchinger Clinics in Germany and Spain offer Otto Buchinger's (1878-1966) fasting method, which has been in practice for more than six decades. Details: www.buchinger-wilhelmi.com

People don't need to undertake highly-restricted fasting regimes to improve their health or lose weight. It's unlikely that there's more to be gained by extreme fasting at all.

At the Genesis Breast Cancer Research Centre, we pioneered the concept of the 2-Day Diet, where people restrict their calories for two consecutive days and eat a healthy Mediterranean-style diet for the rest of the time. It was originally developed to help women at high risk of breast cancer to lose weight, as we know being a healthy weight cuts their risk of cancer.

We've found people can get great reductions in weight and markers of risk of cancer, heart disease and diabetes by restricting calories for just two days a week and ensuring that they maintain the correct balance of protein, fats and carbohydrates on these days. For two days, people can eat between 600-1,000 calories a day depending on their appetite.

Unlike other 5:2 diets, many of which advocate the consumption of just 500



Dr Michelle Harvie

Research dietitian, Genesis Breast Cancer Prevention Centre, UK

calories for two days a week, the 2-Day Diet has been clinically proven in randomised trials of real-life dieters. The results show that intermittent dieting is more effective and easier to follow than a standard, continuous diet – a 65 per cent success rate versus only 40 per cent with a standard diet. We also found that it retrained people's appetites on the five unrestricted days so they eat, on average, 25 per cent fewer calories.

More studies are showing that intermittent calorie restriction is an effective, viable alternative to standard weight loss diets, which in turn can improve health. But the 2-Day Diet has only been designed and tested for weight loss. It should not be followed by those of a normal weight who perhaps have other health issues.

There are many studies looking into and making claims about the anti-ageing effects of intermittent fasting, but most of these have so far only been tested on mice.

Scientists are learning more about intermittent fasting day by day and it's certainly captured the imagination of the public in recent years. It's a results-driven diet that's here to stay and not a passing fad, and so something that reputable spas could certainly look to offer their guests.

For the last 17 years Dr Harvie has specialised in diet and exercise strategies for weight loss and preventing breast cancer. She's also the co-author of *The 2-Day Diet*. Details: www.genesisuk.org and www.thetwodaydiet.co.uk



Spas should offer a range of therapies to complement the fasting regime...

But we find colonics to be a step too far – they're really the domain of the medical spa and should be administered by a trained nurse



Anyone seeking a very strict fasting regime, with little or no food intake, should visit a reputable medical spa.

Austere protocols are best left to specialists and are not the domain of leisure spas.

As a naturopath, I'm not a fan of extreme fasting and I find that most people don't particularly enjoy the process. Anyone who fasts regularly, especially with the goal of weight loss, can affect their metabolism and lose lean muscle mass making it more of a challenge to lose weight.

Lifeshouse offers an intermittent fasting programme based on the 5:2 protocol.

It's a much more sustainable programme that people find enjoyable to do while they're here. They can also easily learn the principles to carry it on in their daily life.

We chose the 5:2 for the wealth of solid research behind it and some impressive potential benefits for those who follow it for a sustained period. With two days of intermittent fasting per week, people are able to lose visceral fat while retaining muscle mass, and the long-term benefits



Sue Davis,

Health and wellness manager and resident naturopath, Lifeshouse Spa & Hotel, UK

appear to be protection against conditions such as Alzheimer's, dementia and decreased risk of certain types of cancers.

Guests who undertake a fasting regime should be closely monitored for the duration of the programme. It's really important that you keep a good dialogue with them as they can potentially become faint, dizzy or experience muscle fatigue due to the sharp reduction in calories – especially if they're not following the programme correctly.

We see our clients daily and give them a diet plan that's very personalised.

Spas should offer a range of therapies that complement the fasting regime. Lifeshouse offers body scrubs and seaweed wraps to aid detox, hot stone massage to help with lymphatic drainage as well

as lava shell massage which gives a deep, detoxifying massage working on the principle of alternating hot and cold therapy. But we find colonics to be a step too far – they're really the domain of the medical spa and should be administered by a trained nurse.

Energy work can also be beneficial. The liver stores emotions as well as toxins and these can be released during a fast or cleanse, so it's important to know how to help clients who become tearful and emotional during their stay.

Davis helped set up the original cleansing programmes at Chiva-Som in Thailand in the early 90s. Lifeshouse offers a range of wellness programmes, including a 5:2 fasting retreat. Details: www.lifeshouse.co.uk

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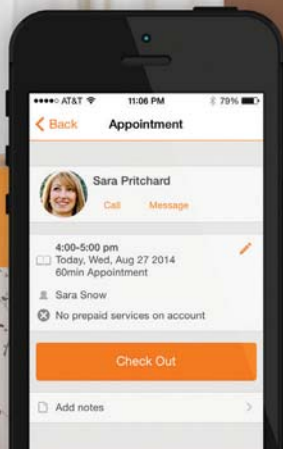
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ESPA

At 21, ESPA is a veteran of the global spa industry, but it's still leading the way. Founder and CEO Sue Harmsworth explains how

Since 1993, ESPA has grown from a small UK-based concern into an undisputed leader in the global spa industry, its brand synonymous with cutting edge design, peerless spa management and the highest quality natural products. With more than 450 spas across almost 60 countries, and top-drawer clients ranging from Peninsula Hotels and Mandarin Oriental to Ritz-Carlton and Four Seasons, the modest products and consultancy business founded by Sue Harmsworth 21 years ago has certainly come of age.

But while ESPA is arguably at the top of its game, it has by no means finished playing. Over the past couple of years, not only has the company reshaped its business model to offer a flexible, solutions-based portfolio – introducing product-only partnerships and tailored support for existing businesses alongside design, development and management services – but it has continued to pioneer groundbreaking products, treatments and spa concepts.

Here, Harmsworth talks about the company's flexible approach, the importance of cultural sensitivity and how, with the right guidance, spas can deliver both an unparalleled guest experience and a strong commercial return.



Sue Harmsworth's career in the spa, health and wellness industry has spanned more than 40 years



Over the last few years, ESPA's business model has become increasingly flexible. Why is this?

When the economic crisis hit in 2008, a huge number of projects were put on hold across the spa industry, and this presented us with the opportunity to work with our spa partners and analyse every detail of their service offering in order to establish clear objectives on which to measure success. It could be that a spa is amazingly well designed, but not being marketed properly, or there are issues with the finances. Or it might be very good from a therapist perspective, but the equipment or treatment menu is letting it down.

As a company, we were coming across so many variables that we decided the time had come to offer our hotel partners a solutions-based, à la carte approach

rather than focusing solely on design, development and management.

The fact that we have such a broadly experienced team is very unusual for the industry and makes us uniquely positioned to do this. Most of our senior managers have been with us for over a decade and have grown through the system, making them the very best in their field, and all of our 200-plus staff worldwide have experience in operations. So we can go in and teach teams, we can do high-level financial and quality audits, review marketing strategies and advise on recruitment – in essence, we really look at what needs to be done to make a business successful. We know what works and what doesn't, and in quite a short time we can impart that knowledge to our clients. And while there are a lot of great product companies and a lot of great spa consultants, there are very few that can offer all those different options as effectively as we can.



We really look at what needs to be
done to make a business successful.
We know what works and what doesn't

You have partners all over the world. How do you make sure the solution you're offering is culturally appropriate? Working in so many countries and with so many markets has given us a genuine understanding of the varying requirements of different cultures. Wherever we're working in the world, we employ as many staff as we can from that region and we try to preserve the skills inherent to that culture, while also teaching them international standards.

But being culturally sensitive is not just about considering the host country; it's about considering the nationality of your guests. For example, you could have a spa in London with a very big Middle Eastern clientele, which means paying extra attention to separate sex areas and issues around privacy and nudity, as these are very important to these guests. Of course, markets sometimes change. You might start off expecting a largely Russian clientele and end up with more Chinese

guests, so you have to be prepared to modify your design, treatment menu and therapist training to account for that.

There's a lot of talk in the industry just now about whether or not spas can really make money. What's your view? Spa financial planning has particular challenges. Whereas a hotel will base its business plan on the number of bedrooms, it's more complicated with a spa. One of the most common questions I'm asked is, 'If I've got a 120-bedroom hotel, how many treatment rooms do I need?' But there just isn't a correlation there. It depends on whether you've got a leisure market, whether you've got MICE business, whether you're seasonal... There are so many differentials involved that coming up with a profitable model is not easy.

That said, from the very start of every partnership, commercial considerations underpin everything we do to ensure our spas make money. We have weekly



The Hammam at ESPA Fairmont Baku

AN ESPA PROMOTION

► conference calls with our spa directors, we do the budgets and we work closely with them on promotions and marketing activities. We have the expertise to do all this and it more than pays for itself.

With the spas we design from scratch, we think very carefully about non-revenue producing areas and whether and how we incorporate them; this includes relaxation areas and also wet thermal areas, which are very expensive to build.

With all the spas we work with, including those we did not design, we look very closely at the breakdown of male versus female guests, whether there's a local market and whether or not we're going to offer memberships. We make sure the treatment menu is succinct, and that every member of the team is trained to deliver a consistently excellent guest experience. We emphasise the importance of building customer loyalty and efficient database management.

Obviously, retail is crucial and we've got some very interesting concepts in that area that are working very well. These include employing retail specialists, emphasising touch and feel in displays, and rewarding both spa customers and our own clients for online retailing, then driving those customers back into the spa. And we've also got an in-room spa amenities range, which further promotes both our products and the spa.

Have you opened any stand-out spas recently?

With so many projects opening over the last year, it's hard to pick just one or two, though we have had some firsts.



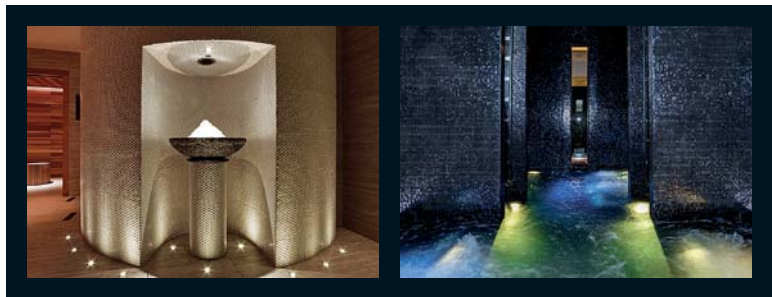
The lounge at Al Faisaliah Spa by ESPA in Saudi Arabia (above) is adorned with Swarovski crystals

ESPA at Fairmont Baku is our first spa in Azerbaijan. It's part of the Flame Towers complex overlooking the Caspian Sea and is just breathtaking. And we've opened our first spa in Saudi Arabia: the Al Faisaliah Spa by ESPA in Riyadh, designed in partnership with Her Highness Princess Al Anoud Bint Khaled Bin Abdullah Al Saud. It's located within the Al Faisaliah Hotel, managed by Rosewood, and is the first five-star ladies' spa in the country.

Other new branded spas include Ritz-Carlton Spas in Kyoto, Bangalore and Abu Dhabi; ESPA at The Joule in Dallas; and Nizuc Spa by ESPA in Punta Nizuc, Mexico. We've also opened some really lovely partnership spas, such as Spa Mont Blanc at the Four Seasons Hotel des Bergues in Geneva and The Peninsula Spa at the Peninsula Paris.

What new products and treatments have you launched recently?

We've just launched Optimal Skin ProCleanser, a beautifully versatile three-in-one product combining a gel cleanser, exfoliator and mask; and in January we'll launch SuperActive™ Skin Radiance



The heat room at the subterranean ESPA at The Joule, Dallas (left); and the indoor hot pool at Nizuc Spa by ESPA, Mexico (right)



ESPA at The Joule Dallas is the ultimate urban retreat

From the start of every partnership, commercial considerations underpin everything we do to ensure our spas make money. We have the expertise to do this and it more than pays for itself

Intensive Serum, a potent super serum to lighten, brighten and firm the complexion. We're also about to launch a new facial incorporating both ProCleanser and Skin Radiance Serum at our spa at Gleneagles Hotel in Scotland. Called the Advanced Pro-Radiance Facial, it's a 90-minute treatment incorporating a deep brush cleanse and brightening mask.

You've also just launched a new treatment programme called Nurture and Support for people recovering from cancer – what's the thinking behind this?

We were one of the first companies to do pre-natal treatments 20 years ago, when we saw that there was an increase in the market of pregnant women wanting treatments, yet most therapists were scared stiff to do them. The same now applies to people with cancer.

Several people I'm close to have had cancer, so I understand how psychologically damaging it can be for someone in recovery to feel they are clear of the disease only to be told by a spa therapist, "Sorry, we can't treat you."

Over the years, we've treated many people with cancer and worked with

numerous health-related organisations. Drawing on this experience, we've come up with six specialised treatments, all of which have been carefully developed around the philosophy of nurturing, soothing and relaxing, without any aggressive products or procedures. The programme is based on the understanding that each individual will have different symptoms, degrees and stages of cancer, and that each cancer will manifest differently in each person.

We have worked with several specialists to make sure these treatments are completely safe, but we're not making any medical claims for them: the emphasis is very much on helping people to relax and feel cherished. Every treatment begins with breath work and visualisation, and guests can choose from a facial, body envelopment, energy balancing treatment, full body massage, scalp massage, and hand and foot ritual.

The most advanced therapists will deliver these treatments and they will only go into select locations that have the



Optimal Skin ProCleanser, a revolutionary three-in-one radiance-boosting cleanser

necessary support systems in place and that are willing to invest in training. This has been a huge investment for us, and we don't necessarily expect to see a large return on it, but that's not why we're doing it.

What's next for ESPA?

We'll continue to work hard to surpass guests' expectations, both in the spas that we manage and those that we partner. Wellness remains close to my heart, so we'll continue to roll out ESPA Life – our wellness concept for hotels – and we'll continue to push the envelope when it comes to new product and treatment development, particularly in the areas of ageing and women's health. As a company, we do feel that we are leaders and innovators, and while we don't want to be the biggest, we do want to continue to be the best. ●

Hotel Nové Lázně in the Czech Republic treats kidney disorders using its calcium-magnesium rich waters

PHOTOGRAPHY BY CHRISTIAN BANFIELD AND HELEN ABRAHAM

natural resources
PART
3
natural resources

MINERAL MATTERS

Sophie Bengé closes her series on the healing power of natural resources in central and eastern Europe with a focus on mineral water and mud

In this series, we've looked at some key components of the central and eastern European spa experience that make it a strong contender in the growing market for wellness tourism: namely its rich seam of natural resources which have been used for centuries to relieve physical pain and stimulate emotional wellbeing.

These natural elements were rigorously studied by chemists and doctors in the 19th century before treatment protocols were developed for a variety of health disorders. That many of these therapies remain unchanged after 200 years is testimony to the authenticity and expertise that infuses the health culture in this region.

This final article examines mineral water – the most abundant healing source – and mud, which is probably the most

potent. It can be argued that both form the basis of the historical reputation for wellness that has brought royalty and the intelligentsia to spa towns from the Baltic to the Black seas for two centuries.

England's King Edward VII visited Marienbad (now Mariánské Lázně) in the Czech Republic nine times to treat his gout, while in nearby Karlsbad (now Karlovy Vary), the list of visitors in search of redress for their overindulgent lifestyles includes Brahms, Beethoven, Bismarck and Bach... and that's just those listed under B!

Water world

Mineral waters sourced from underground have a high mineral composition and specific chemical properties, as well as differing physical properties such as temperature and trace elements. Together

these features can help with a full spectrum of body processes from circulation and digestion to immune function and even fertility. That's quite some panacea.

To understand the potency of the mineral water in central and eastern Europe it helps to make a comparison with a brand such as Evian. A 750ml bottle states that this water contains 26mg of magnesium per litre. In contrast most waters in Romanian Transylvania contain more than 3,000mg of magnesium per litre. There are 6.5mg of sodium in Evian and 100 times this amount in Zuber, the strongest of four brands of bottled water from the Polish spa town of Krynica-Zdrój, which is particularly good for liver complaints.

There is barely a mineral water source in the region which local people don't claim has the most potent water in all of



Water inhalation at Wielka Pieniawa Spa, Poland (above); potent Valcele mineral water (below left); no-nonsense mud therapy at Széchenyi Thermal Baths, Budapest (below right)





A mineral water bath cubicle at a health resort in the spa town of Druskininkai, Lithuania

- Europe for improving health. Alongside broad similarities there are place-by-place distinctions for determining where to go for particular afflictions.

The calcium-magnesium ratios in the cold water of Mariánské Lázně in the Czech Republic makes the spa at Hotel Nové Lázně a well known centre for treating kidney and urinary tract disorders.

A focus on the natural resources of central and eastern Europe forms part of an upcoming book, *Healing Sources, Spas*

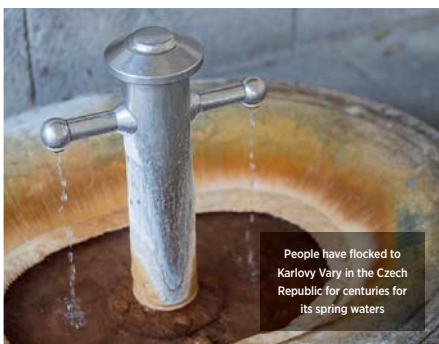
and *Wellbeing from the Baltic to the Black Sea*, which will be published by Prestel in December. Details: www.thehealingsources.com



Alternatively in Kemerli, Latvia the unusually high levels of hydrogen sulphide in some water bring down the cholesterol levels in blood, according to Dr Ines Zeidler, a professor of physical medicine and rehabilitation at Jaunkemerli Health Resort. He claims that during one 20-minute bath in this particular warm mineral water, patients take in as much as 70mg of hydrogen sulphide through their skin and via inhalation.

Different again are the thermal effects of the hot water of Piešťany in Slovakia which, when experienced in bathing treatments, helps optimise the mechanical movement of the limbs. The water also contains a high amount of sulphur (578mg per litre) which is believed to help strengthen connective tissue, like ligaments, cartilage and tendons. In addition, it leaves sulphur deposits on the epidermis which can ease skin conditions such as eczema and psoriasis.

In other words, Spa Piešťany is a good choice for those people who want to ease



People have flocked to Karlovy Vary in the Czech Republic for centuries for its spring waters



Bottled mineral water from the Polish spa town of Krynica-Zdrój contains high levels of sodium which is said to be good for liver complaints

stiff joints and muscle pain, while also nurturing baby-soft skin.

Drink, breathe, bathe

As well as geographical differences and variations in chemical composition and water temperature – from very cold in Romanian Transylvania to virtually boiling in some springs in Budapest – there's the choice of how best to take the 'water cure'. Usually water cure programmes include a combination of drinking and bathing in water and inhaling its vapours. These three elements form the mainstay of balneotherapy, the discipline for treating illness through medicinal spring water, and a programme will be carefully prescribed by a doctor according to each guest's needs.

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- www.piestany.danubiushotels.com
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www.lifeclasse.net



Many pools in central and eastern Europe, such as this one at Spa Wojciech in Poland, are filled with local mineral water

Glorious mud

In central and eastern Europe mud is used therapeutically in a very different way to what we're accustomed to in the western spa industry. Rather than being used in a beauty mask or in a thin layer smeared over the body in a wrap, mud here is commonly used by the bucketload for slapping over joints (see p64). It's often mixed with mineral water in a bath, or even wrapped around the gums in a gauze tube or inserted vaginally to stimulate fertility. One of the most unusual ways to experience mud is at Irma Spa at Health Spa Piešťany, Slovakia, where it carpets one of the most elegant spa pools in Europe. Guests cover themselves in fistfuls of soft, silky mud, that they've scooped up from beneath their feet.

As is the case with mineral water, it's the mineral breakdown of each mud deposit which determines its precise curative capabilities and this varies from

source to source. Some mud comes from thousands of years of rotting vegetation to form a type of peat. Other mud is mined from deep below ground and prescribed for inflammatory disorders, such as in Budapest's spas. Mud is also harvested from the sea bed in Haapsalu, Estonia on the Baltic coast and in the coastal town of Portorož, Slovenia on the Adriatic sea. In Portorož, salty clay is used in facilities such as the Life Class Hotel Spa, primarily to treat locomotive issues.

As with mineral water, mud has a great capacity to help with a disparate range of afflictions: rheumatic, digestive, circulatory, locomotive or gynaecological. It's even proven to slow down – and in some cases reverse – degenerative deterioration.

This is just a glimpse into therapeutic properties of mineral waters and muds, the two most ubiquitous natural resources in the region with the greatest range of influence on our wellbeing. ▶



A mud gum treatment in Lithuania (above left); the silt-lined pool at Irma Spa, Slovakia (above right); mud is used by the bucketload at Fra Mare Thalasso Spa, Estonia (below)





FIRST-PERSON EXPERIENCE:

SOPHIE BENGE

My mud wrap at Széchenyi Baths in Budapest starts with me following a man dressed in boots and shorts, dragging a trolley which carries two dirty buckets brimming with thick grey-green mud. Inside the treatment room, spartan with hard surfaces and only mildly updated since it was built in the 1890s, he points to the bed while putting on rubber gloves. Never a word is uttered. In fact never has a treatment seemed more matter-of-fact or, as I realise a while later, more profound.

I'm sitting naked on a plastic sheet as he splits fistfuls of soft warm mud onto the bed behind me. He then covers my elbows and presses my back downwards into the thick layer before slapping more round my shoulders, so that it snuggles up my neck. He quickly whacks a dollop on each hip bone, wrist, knee and ankle, pulls the sheet tight round my body, places a tarpaulin over that and walks out.

No scents, no music, no dimming of lights. I wriggle to feel the full sensuality of the mud against my skin and soon surrender to feeling warm, albeit increasingly sweaty, drowsy and still. I like being bundled up under this heavy coat of mineral-rich goodness. Twenty minutes later, the gloved and booted man – with body odour – unceremoniously unwraps me, flicks the thick clumps of mud onto the floor and leads me to the shower to rinse



Despite the spartan setting, the soft, warm mud wrap at Széchenyi Baths has a profound effect on Sophie Benge

“My mud wrap starts with me following a man dressed in boots and shorts, dragging a trolley which carries two dirty buckets brimming with thick grey-green mud”

me down. I then take over to remove any mud residues from my orifices!

This is a one-product treatment with a multitude of effects: soft skin, loose limbs and muscles, bright complexion, clear thinking and, at first, a feeling of being light headed. I needed to sit still and quiet for a while as I waited for the gentle pulsation through my veins to fade and a mild pressure in my skull to subside.

While sitting I met a woman who told me her story, through a translator. Her hands had been clawed with arthritis but after 10 days of daily dunking in a bucket of this mud, her fingers were starting to unfurl. Joy radiated from her face.


This mud, mined from a natural reserve outside Budapest, treats up to 1,000 people daily across the city's famous medical spas. Its a blend of magnesium, calcium and potassium plus copper, iron, manganese and selenium.

Mud wraps like this are generally prescribed as part of a course to treat inflammatory conditions – or, in my case, as a general detoxifying tune-up, with real palpable effect on my body and mind. ●



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Banya, the famous sauna culture in Russia that's more than 1,000 years old, is ripe for development

Everyone's talking about **RUSSIA**

Jak Phillips gives an overview of the Russian spa industry and those working in the sector share their insights on the opportunities and challenges for businesses

As the world's largest country by area, Russia boasts a diverse landscape and with it comes copious natural resources, ranging from thermal water in the highlands through to abundant muds, salt, herbs and gases suitable for holistic treatments.

As with the other BRIC economies, Russia's middle class is growing rapidly – jumping from 30 to 60 per cent of the total population from 2001-2010, according to data from the *Russian Longitudinal Monitoring Survey*. This burgeoning demographic makes up a significant proportion of customers for the spa market which is dominated by domestic tourism. In addition to growing disposable incomes, Russia's 143.5 million citizens have considerable time to spend at leisure, with state employees receiving 24 days vacation each year, plus 10 public holidays.

International tourism is also growing, with inbound visitor numbers jumping 13.4 per cent (United Nations World Tourism Organisation) to 25.7 million in 2012, although the country still suffers from an image problem. Despite this, major

events like this year's Winter Olympics in Sochi and the 2018 football World Cup are expected to boost interest.

One of the main weaknesses of the Russian spa industry is its lack of infrastructure and organisation. The last major analysis of the sector – *Overview of the Current State of the Russian Spa Industry* – by consultant Nina Tsybal (see p72) was conducted in 2008 and statistics are hard to come by. The Spa and Wellness International Council, a Russian spa body (see p70), estimates that there are 1,500 spas in the country, with only one third corresponding to international standards.

In addition, there are around 2,000 traditional medical-focused health resorts, or sanatoriums, which are often located on mineral springs or the coastline. Today, a resurgence of these dilapidated sanatoriums is underway and international players are circling to develop them into spa hotels, particularly in the Sochi area.

Banya, the famous sauna culture in Russia dating back 1,000 years, is also ripe for development (see SB14/2 p50). Public bathhouses like Sanduny in Moscow are located across the country while modern

facilities such as Fox Lodge – a lakeside retreat north of the capital – are including them as part of a conventional spa offer.

What might scupper the growth of the spa industry in Russia, however, is economic instability and, from an overseas tourism and investment perspective, international relations following the annexation of Crimea. If the oft-discussed visa agreement with the EU comes into play, this could offer a solution to these barriers but this is contingent on whether the currently frayed diplomatic relations can ever become close-knit.

Here, we ask operators and consultants in Russia about the state of the country's spa industry, the cultural and economic factors affecting it and what trends, opportunities and obstacles they're seeing.

Special thanks to Galiya Abaydulina, the brand manager for Thalio in Russia, for her help with the research of this feature.

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There's much potential to increase spend from clients, as the arrival of big international firms in Russia has driven up wages, leading to more disposable income for the middle classes. The women here are highly competitive when it comes to looking good and are happy to pay for it. We're also seeing a noticeable shift in the media towards health and wellness – perhaps reflecting the interest of readers – with a lot more articles focusing on fitness, diet and beauty.

In terms of weaknesses of the spa industry, infrastructure still leaves a lot to be desired and there's a lack of qualified spa managers, although the work of the Spa and Wellness International Council is doing a lot to improve this (see p70). At the moment, the bulk of investment comes from wealthy Russians, who want to own a beautiful business, but lack the nous to make this a reality. As a result, we're seeing a lot more tie-ups between



Ekaterina Sharkova

Assistant manager at Mandara Spa,
Lotte Hotel Moscow

Russian investors and firms from the EU, something I hope will help to hasten the improvement of standards. However, overseas investment regulations in Russia are still quite strict, so it's essential that international companies which are looking to move into the market have strong Russian partners. As you might expect, we're seeing many more spa consultants popping up to bridge the gap.

Hospitality developments in Sochi, sparked by the Winter Olympics, have attracted several international players and again, this will hopefully drive up standards. There's also the 2018 World Cup on the horizon and I think there's a real gap in the market for affordable four-star hotels,

whose numbers are currently dwarfed by exorbitant five-star establishments. Whether a lot of this will be successful hinges largely on international relations. It's becoming easier to get a Russian [tourist] visa, but it still requires a lot of time and money, so agreements between countries will be key to boosting visa accessibility and getting more people coming to visit.

A key member of the Mandara Spa team at Lotte Hotel Moscow, Sharkova has contributed to the success of the facility which has won numerous awards since opening in 2011. Details: www.mandaraspas.com

Overseas investment regulations in Russia are still quite strict, so it's essential that international companies which are looking to move into the market have strong Russian partners

We're seeing a generational shift in Russia's spa clientele, which could yet become one of its biggest strengths. The baby boomers who used to visit spas for self-indulgence, are more wellness-focused, motivated by the need of active longevity. Meanwhile, spas are becoming an essential component of a healthy lifestyle for new generations of clients, who've left university and are now earning competitive salaries.

There's also an interesting trend towards spas for children. It's a concept I first tried out in 2002 and I've since advised on an increasing number of projects. In Kazan, an existing kids spa is now expanding to become a wellness centre offering hydrotherapy, halotherapy and kinesiotherapy.

New spas in Russia can easily compete with the best facilities in western Europe and the Americas with their picturesque locations, innovation, medical training, menus and designs. However, the service skills of our massage and beauty therapists leave a lot to be desired. Aside



Elena Bogacheva

Founder and president, Spa and Wellness
International Council (SWIC)

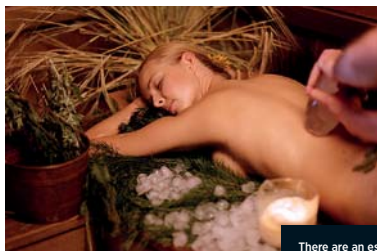
from better training, we have to change the mentality of staff, to shift from the supervisory attitude of former physicians and nurses to a sincere willingness to serve and please.

There have generally been very strict regulations for spa services in Russia which has made it difficult for the industry to expand with confidence and attract investment. Because health resorts/sanatoriums have been intrinsic to the industry, all facilities needed to obtain a medical licence to operate and were regulated by the healthcare system – even if they were only offering manicures or pedicures. But in January, two National Standards for Spas and new codes were adopted so non-medical spas no longer need to operate under Health Ministry standards or obtain a medical licence. This

was a major achievement for SWIC [which led the negotiations] and the spa industry.

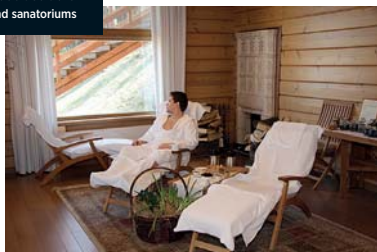
Old health resorts in the south are hot spots for development. They have a wide range of scientifically-proven healing methods, skilled medical staff and are often based around mineral sources. The resort town Kislovodsk, with its unique springs, is on its way to becoming the Russian Carlsbad. Likewise the city of Sochi, with its therapeutic 'macesta' muds now has infrastructure from the Olympics and has huge potential to become a hub for international wellness tourism.

A pioneer of the Russian spa industry, Bogacheva founded SWIC in 2010 to help raise standards and drive forward development in the sector. Details: www.iswic.ru



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There are an estimated 1,000 spas in Russia, plus 2,000 traditional health resorts and sanatoriums



66

The economy isn't currently as strong as it has been – the rouble crashed 11 per cent in the aftermath of the Ukraine incident – and this makes it very expensive to import products from overseas

99

One of the best things about Russian spa specialists is that they're highly-trained [thanks to the health sanatorium tradition]. They must go through two to three years of medical training and this means they're able to solve clients' body problems by carrying out detailed diagnoses and then recommending holistic solutions. Many of them also travel either to Europe, Japan or Thailand to learn their trade and this means they arrive with a broad range of influences and ideas.

As a city spa, this enables us to diversify our offering. It's important that we can cater for all of our clients' needs while remaining innovative, so it's vital that our staff are creative and able to form long-term relationships with customers.

The fact that Russian spa specialists are very creative, multi-disciplined and each bring their own personal approach can



Julia Johansson
CEO, Spa Orient Express

also be a downside though. Their urge to individualise treatments means they're nearly impossible to train to a set level of consistency and they frequently break protocol – although this is mainly because they want to deliver as much as they can and satisfy every need of their client.

From a product point of view, Russians expect instant results and like to use different products, so some international hotel spas struggle because of their single-brand tie-ups. Rents are very high in Moscow and retail makes up around 25-28 per cent of spa income, but one of the big threats is that clients are starting to buy discounted products from retail outlets.

Spas are trying to counter that by pursuing city-exclusive tie-ups for sought-after products, but this can also be problematic. The economy isn't currently as strong as it has been – the rouble crashed 11 per cent in the aftermath of the Ukraine incident – and this makes it very expensive to import products from overseas, especially when you factor in registration and other administrative prices.

Johansson has been CEO of central Moscow's Spa Orient Express for almost 15 years. The facility also houses one of Madonna's Hard Candy Fitness gyms. Details: www.orientexpress-spa.ru

www.schletterer.com

Russia has a steadfast philosophy that medicine and spa therapies are intrinsically linked and a lot of this can be traced back to the late 1940s when the Soviet Union looked to kick-start technical innovation. They needed workers to be fit and healthy so lots of government money went into wellness research and workers were sent to sanatoriums for a mix of relaxation and medical procedures to maintain their health and ensure they were fit for purpose. This sowed the seed for what has now become the trend of medi-spas.

Our hospital (in Moscow's exclusive Rublevka district) offers treatment programmes to pregnant women and more recently the over 50s, combining spa and medical procedures. Pregnant women are by far our biggest customers because they want to stay fit, beautiful and minimise the impact of pregnancy on their bodies,



Elena Silantyeva

Professor in rehab and obstetrics/paediatrics, Lapino Medispa

while ensuring a safe birth. We've started to attract a lot of clients from the UK, Germany and the US – particularly those with prior infertility problems – and this seems to be a growing market.

On the medical side, we provide birthing, cosmetic surgery, cardiac analysis and dietary programmes. In terms of wellness, spa therapies are used to supplement the benefits of medicine. For example, we've found that the ability of postnatal electrotherapy to relieve muscle and joint pain can be doubled by following the procedure with thalassotherapy. Many spa therapies have a medical benefit and many medical

procedures are best performed in a natural spa setting, so it seems like an ideal fit.

One of the reasons we expanded to cater for over 50s was because health levels in Russia are low. There's little access to preventative medicine and many are not well enough to undergo conventional treatments, so there is a need to combine spa with medicine.

Silantyeva has carved a niche in the medi-spa sector by combining her medical background with spa therapies to specialise in wellness offerings around birthing and anti-ageing. Details: www.meclinics.com



Alignment with social tourism, improvements in transport infrastructure and the preservation of natural resources all need consideration as the sector grows



In Russia, as in many other parts of the world, the interest in disease prevention is steadily growing and this presents one of the biggest opportunities in our sector. This July, I completed a report – *Overview of Wellness Tourism in Russia* – based on data from the Russian Union of Travel Industry to look at this part of the industry, its trends and measures for improvement.

The term 'curative & wellness tourism' is the most appropriate in Russia due to its health resorts (historically called sanatoriums) based around natural, therapeutic resources such as mineral water and mud. Typically, such resort holidays offer an all-inclusive pre-paid treatment package consisting of a medical check-up and at least three to four daily treatments.

There are around 2,000 traditional health resorts in Russia. And fuelled by mostly Russian investment, there are a growing number of hotels – the total was over 9,000 last year. Many of the new high-end hotels are managed by international operators and offer modern spa facilities.

Overall, wellness tourism is on an upward trajectory. Tour operator ALEAN reports that wellness tours accounted for



Nina Tsymbal

Spa consultant, Russia

30 per cent of business last year, compared to only 10 per cent in 2007. Inbound tourists play a minute part in this, with figures from the Moscow Medical and Health Tourism Congress showing that less than 1 per cent of foreign visitors stayed at sanatoriums in 2012. In comparison, in 2013, almost 33 million Russians travelled inside the country and 8 million (24 per cent) of them went to sanatoriums.

One of the greatest trends is a shift in the demographic of wellness tourists. In the past, the majority were aged 45-70, but today they're mostly 30-50 – although more than 50 per cent of customers are still women over 45 years old.

Older wellness tourists still prefer traditional sanatoriums. They choose the destination according to the curative resources and therapeutic specialisations that match their own health concerns. In contrast, younger wellness tourists opt

for beach holidays and spa centres. Most aren't familiar with traditional domestic sanatoriums, but they travel abroad and are accustomed to western service standards and look for these back home.

In fact, there's a growing preference for five-star facilities across the board as even those staying at sanatoriums now expect comfortable accommodation.

Modernisation of resort infrastructure is a key area to focus on when it comes to the future of wellness tourism in Russia. Other areas of consideration moving forward should include alignment with social tourism where funds are allocated for social needs; improvements in transport infrastructure; and legislation to preserve the natural resources as the sector grows.

Based in St Petersburg, Tsymbal has been a spa consultant in Russia for 14 years. Details: ntsymb@peterlink.ru



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spa business uniting the world of wellness

JIM SPEAR

Katie Barnes talks to the man behind The Schoolhouse, a sustainable tourism enterprise – including a boutique hotel and spa – that he's established in a remote village near the Great Wall of China

In 1986, American Jim Spear and his wife Liang Tang moved with their daughter to Beijing. Spear had a master's degree in political science from UC Berkeley and took a consulting job in the city at an exciting time of rapid development. On a weekend trip to a remote part of the Great Wall of China in Mutianyu, 70km north of Beijing, they purchased a peasant's house on a whim with a view to turning it into a country retreat.

Since then, they've turned an abandoned primary school into a restaurant and glass factory, old homes into designer rentals and a brick kiln into an eco-lodge and spa which has welcomed guests from over 100 countries. The businesses, known collectively as The Schoolhouse, have put Mutianyu on the tourist map. And they've done so while supporting the local community.

Here, Spear tells *Spa Business* about his inspiration for The Schoolhouse, how the project grew and what it's like doing business in rural China.

Where did you get the idea to develop The Schoolhouse? Not long after I moved to Mutianyu full-time, the mayor called me to the village hall and gave me a lecture – the community had a declining and ageing population, low incomes and



Spear was asked to create a business to support locals by the village mayor

lack of investment. He asked me to give something back to my adopted home. He really got me to open my eyes to what was happening around me.

What was your vision? To make an investment that would provide jobs to local employees and suppliers while running an ethical, sustainably-designed, operation.

Today our businesses include a gallery, general store, orchard, several farm plots,

a food product development centre, three Slow Food restaurants, rental homes, meeting facilities and, of course, the Brickyard boutique hotel and spa.

Overall the goal was to help Mutianyu at the Great Wall become a more recognised tourism destination – and now it ranks 14 in the top 25 landmarks in the whole wide world on TripAdvisor!

What's it like doing business in China?

Like most other foreign investors we've been granted 'national treatment' – meaning we get treated like a Chinese-owned business. That's not always a blessing, as there are strict rules and laws to abide by. But overall it's fairly transparent. People who fail here often blame corruption or culture, but sometimes that's just an excuse for not doing a good enough job.

Why did you build the Brickyard? My wife

found a working tile factory in Beigou, the village next to Mutianyu, in 2006 and thought it would be a great site for a new project. It was a desert and the chimneys belched out horrible acrid, black smoke. I was appalled and thought 'no way' until she told me to turn round and I saw the incredible view of forested ridges topped by the imposing Great Wall.

How did you design it? My aim was to keep the factory buildings and complement them with rooms, all 25 of which have views of the Great Wall. I redeployed every scrap of building material, including used bricks and broken glazed tiles. I think the Brickyard is a happy marriage of traditional and vernacular building styles with a modern aesthetic.

Tell us about your book *Great Wall Style* which launched last year. I have a passion for design and as well as the Brickyard, I've refurbished dozens of homes in or near Mutianyu including nine that we rent out. After these were featured in



The Brickyard supports the Slow Food movement and meals are based on homegrown produce



Spear kept many original features of the brick kiln in the spa including red bricks (above) and glazed tiles (left)



The site was chosen because of its impressive views of the Great Wall of China (below left and right)



INTERVIEW: JIM SPEAR

► *Architectural Digest*, people asked to see more. With the help of their wonderfully talented photographer Robert McLeod and an international stylist, Ampol Paul J, we created a book that would encompass Great Wall style – not just my designs but the incredible setting of the Great Wall, the villages and the villagers themselves presented imaginatively.

Who are your customers? There's an equal split between Chinese citizens and people from other countries, with most of those coming from Europe and North America. There's a mix between tourists and business people who have meetings here or take a break at the Great Wall before or after corporate trips elsewhere.

What's your spa like? My wife and I have enjoyed spas in many places. I'm really selfish, so when I designed the Brickyard Spa I designed it first to please us. It's not huge – we have just three treatment suites – it's not gold-plated. It's a concrete expression of what I like to think of as the 'luxury of simplicity'.

The building is set apart from the rest of the Brickyard in an area that features our kitchen garden, the lotus pond and yoga platform, arbors and secluded areas for relaxation. The grounds get more beautiful, fragrant and peaceful as the years go by.

The walls are red brick with tiled murals created by local craftsmen and the floors are polished native slate. All of the furnishings were handmade to my design from distressed old elm.

It's an intimate place to relax in peace. The Gold Suite has a sauna with direct views of the Great Wall. There's an exercise room as well as an outdoor whirlpool where guests can take in the mountain scenery and stars at night 365 days a year.

What's the benefit of having a spa? A balanced life requires physical and mental nurturing and many of the guests we attract feel the same way. And our relaxing spa complements the many sports and activities on offer around Mutianyu.

It gets booked up, especially on weekends, and the number of guests taking treatments increases 25 per cent each year.



Spear has a passion for design and sustainability

“ I designed the spa to first please us. It's not huge or gold-plated. It's a concrete expression of the 'luxury of simplicity' ”

How did you decide what treatments to offer? This was easy. We kept it simple. Chinese tui na is a special, traditional bodywork massage that stimulates energy (or chi) in the meridians and muscles. And we were able to find experienced therapists to offer a high-quality treatment. We also offer a warm foot soak followed by a complete massage of the feet and lower legs. That's a no-brainer as so many of our guests explore and hike the mountains near us.



Spear was involved in a book focused on *Great Wall Style* design

What yoga classes and retreats do you have? We offer outdoor sessions

by the lotus pond with a professional teacher nearly every Sunday morning in spring and autumn when the weather is most suitable. This year, we organised six weekend yoga retreats that included complementary meals. The programmes are small-scale, simple and participants report enjoying them very much.

What products do you use? Everything's natural. Our balms, shampoos and conditioners are from Shangrila Farms, a supplier that shares our commitment to making a difference in rural China. Liquid soap is by Kaimi, certified natural and pure. There's a selection of high-quality

teas from toasted barley to peppermint. And we make our own potpourri, foot soak and eye pillows containing local lavender, while our filtered ice water has lemon and mint from our garden.

How does the spa help to support the Mutianyu community? It supports nearby suppliers. Many products are sourced locally including our spa pyjamas, which are handsewn by a local seamstress and our singing bowls from our sister business Schoolhouse Art Glass.

As a rule, we also like to employ and train local people but unfortunately we weren't able to hire therapists from the area as we couldn't train or certify tui na which is a specialised therapeutic massage.

What's your overall goal at the Brickyard and The Schoolhouse? To provide wonderful experiences for our guests and sustain our business while making a difference in our community.

What drives you? Beauty, building, learning, providing ways for other people to thrive, making guests feel special and becoming a better person. ●



Katie Barnes is the managing editor of *Spa Business*
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Ngāi Tahu is the main Maori tribe of south New Zealand

TRIBAL GATHERING

Ngāi Tahu, an entrepreneurial Maori tribe, has a growing wellness tourism portfolio in New Zealand. Jennifer Harbottle takes a look at how its built up business and its plans for hot springs developments

If you're one of the millions who've visited the land of the long white cloud, chances are you've also taken in at least one Ngāi Tahu Tourism (NTT) attraction.

NTT belongs to Ngāi Tahu, one of the richest Maori tribes in New Zealand (see p84). The organisation owns and runs eight iconic visitor experiences across the country, including jetboat rides and a wildlife park (see p82). It's also behind the Glacier Hot Pools on the South Island and has just announced plans to develop a second hot pool attraction in Queenstown.

MARKET GAP

The Ngāi Tahu tribe entered the tourism industry more than 20 years ago by investing in, and eventually fully acquiring, a number of nature-based leisure operations under NTT. A key business included

guided tours of the Franz Josef Glacier in the Southern Alps, an area famous for its outdoor activities – there's hiking, cycling and kayaking as well as the glacial walk. But NTT felt something was missing. "Our [market] research showed visitors wanted a more leisurely offer, as well as something that could be done at night and enjoyed by all demographics," says Kerry Myers, a regional sales and marketing manager for NTT. People kept suggesting something for relaxation and rejuvenation in the research. This prompted NTT to develop the Glacier Hot Pools, its first start-up venture, which opened in 2008.

"We decided the hot pools were the perfect mix with all the other activities on offer in the area. They gave visitors a chance to relax after a few days in the wilderness and had the added benefit of being an all-weather attraction."

DIPPING IN

The popular Glacier Hot Pools attraction is nestled within a rainforest at the footfalls of the Franz Josef Glacier. It's a natural setting that's fitting for the outdoor activities market it targets.

Currently, facilities consist of three public and three private pools – which range in temperature from 36-40°C – and a massage facility. But plans for expansion include up to 11 more pools.

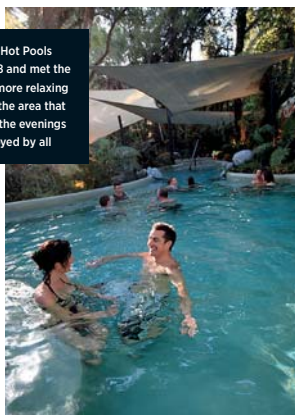
The public pools are located at the front of the property and for NZ\$25 (US\$22, €16, £13) guests can spend as long as they want in them. For a more exclusive experience, the private pools are set deeper into the rainforest and cost NZ\$85 (US\$74, €55, £43) for 45 minutes and can hold up to four people. They have dedicated changing facilities and the price also includes entry into the public pools.



The tribe runs eight iconic outdoor visitor attractions in New Zealand, including guided tours of the Franz Josef Glacier (below middle)



The Glacier Hot Pools opened in 2008 and met the demand for a more relaxing experience in the area that could open in the evenings and be enjoyed by all





The hot pools are filled with water collected from the glacier and heated by gas. The water treatment process uses a combination of salt and electricity to sanitise the pools and while there is a natural spring on-site – one of over 20 in the area – NTT hasn't plugged into this yet.

"We're not 100 per cent sure where the spring is, but we do know it's located in a fault line zone and that it's prone to movement because of the shifting landscape," explains Myers. "The cost to drill down, combined with the uncertainty of the location, makes it prohibitive at the moment." But she adds that it could be something worth considering once they have more pools.

As the massage facility only has one treatment room, the menu has been kept simple. There are relaxation, deep tissue or hot stone massages, using local organic beeswax products, which cost NZ\$85 (US\$74, €55, £43) for 30 minutes or NZ\$175 (US\$175, €153, £113) for 90 minutes. However, plans are in motion to expand. This year, the company begins the largest development on-site since its opening, including the addition of a couple's massage room, as well as a small café and extended retail area.

"The new development will mean we can expand our therapeutic offer and cater for a wider range in the market," Myers

Up to 60,000 people a year visit the hot pools and the experience is proving so popular that there are plans to add 11 more pools



BUSINESS AT A GLANCE

The Ngāi Tahu Tourism portfolio includes:

- Shotover Jet (Queenstown)
- Franz Josef Glacier Guides (Franz Josef)
- Glacier Hot Pools (Franz Josef)
- Rainbow Springs Kiwi Wildlife Park (Rotorua)
- Huka Falls Jet (Taupō)
- Agrodome (Rotorua)
- Dart River Safaris (Queenstown)
- Hollyford Track (Fiordland National Park)

says. "Our plan has always been to develop the treatments to meet demand and with customers indicating their desire to see more in terms of an offer at the complex, we're now in the position to do so."

At the front of the site, a joint reception area for the Glacier Hot Pools and the Franz Josef Glacier Guides is also in the works. This makes commercial sense, given that a ticket to the glacier includes a complimentary visit to the hot pools. As of this month, visitors will be able to check in for their hikes on the ice and return to the Glacier Hot Pools straight afterwards to warm up and relax.

IMPORTANT CONTRIBUTOR

Myers says the Glacier Hot Pools are a long-term investment that have helped NTT to expand its product offering in Franz Josef. Each of the businesses in NTT's portfolio operates separately, partly because of the diversity of the offers. However, geographical clusters have been formed – the hot pools are part of the West Coast group – and general management and marketing are shared across them.

"NTT has significant visitor levels at the Franz Josef Glacier and the Glacier Hot Pools provide an additional activity for these visitors," Myers says. "This makes the West Coast cluster an important contributor to the overall group."

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“It will be an all-weather activity that will also give us the chance to create cross-selling packages with our jetboat operations”



The NZ\$25m proposed development in Queenstown includes 16 hot pools and a day spa and is expected to attract up to 300,000 annual visitors

QUEENSTOWN PLANS

With the hot pools adding another dimension to its portfolio, NTT is keen to replicate the model elsewhere. And the organisation is now in talks with Lakeview Holiday Park in Queenstown

to lease 7,500sq m (80,730sq ft) of land to build a major hot pools development. The site is within walking distance of the centre of Queenstown, where it already operates Shotover Jet and Dart River Jet boat rides – major tourism experiences.

The NZ\$25m (US\$21.9m, €16m, £12.6m) proposed development includes 12 large public hot pools, four smaller private hot pools, changing facilities and a day spa in addition to a café-restaurant.

David Kennedy, NTT's regional general manager in the area, is responsible for seeking out growth potential. And he anticipates that the new hot springs attraction will draw in up to 300,000 visitors a year and will boost NTT's existing businesses too. “The Queenstown Hot Pools will be an all-weather activity that will also give us the chance to create unique cross-selling packages with our jetboat operations,” he says.

In July, NTT also welcomed a new CEO. Quinton Hall, previously COO of another New Zealand attractions company Tourism Holdings, has extensive operational experience in the tourism sector. Ross Keenan, chair of NTT, is confident he'll help to drive future success: “His [Hall's] wide industry knowledge of distribution systems, with particular expertise in systems development, reflects our current business objectives.” Meanwhile, Hall himself is relishing the opportunity of “working with such an exciting portfolio of iconic tourism operations and brands”. ●



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ENTREPRENEURIAL HISTORY

Ngāi Tahu is the principal Maori tribe of south New Zealand. The tribespeople settled in the region more than 800 years ago and originally made their money in the economies of whaling, agriculture and, later on, by selling their land.

As times changed, so did the entrepreneurial tribe and in 1998 it set up Ngāi Tahu Tourism (NTT) and purchased a controlling stake in Shotover Group, which owned a number of leisure operations in Queenstown, Taupō and Rotorua (see p82). In 2004, NTT took on full ownership of Shotover.



All money is invested back into the tribe's community to preserve the culture that is at the heart of its existence

NTT is one of four subsidiaries of the Ngāi Tahu Holdings Corporation, which invests in businesses on behalf of the tribe's charitable trust to ensure a sustainable social, cultural and environmental future for the Ngāi Tahu community. Other subsidiaries

are involved in seafood, property and finance.

Today, Ngāi Tahu is one of the richest tribes in New Zealand. Last year its turnover was NZ\$230m (US\$202.8m, €147.7m, £117.6m) and its tourism division accounted for around 18 per cent of that.

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Susie Ellis (centre) with this year's co-chairs Neil Jacobs and Anna Bjurstam



Pete Ellis says the GWI will raise funds to help move the industry forward



International architect Bjarke Ingels spoke about 'hedonistic sustainability'



BRIGHT FUTURE

Fast Forward, the theme for this year's Global Spa & Wellness Summit, gave international spa industry leaders a glimpse of what to expect down the line – and it's promising. Katie Barnes reports on the annual event

The eighth Global Spa & Wellness Summit (GSWS) held in September at the Four Seasons Marrakech, Morocco, was the biggest summit to date.

It attracted more than 400 delegates from 45 countries, representing key people in the global spa and wellness sector and related industries including ministers of tourism, private equity firms, real estate developers and architects. Their mission? To put aside competitive differences and come together

for the good of the sector to help it develop and to raise its profile. Or as the GSWS tag line simply puts it – 'joining together, shaping the future'.

In keeping with the summit's overarching theme of *Fast Forward*, delegates heard about the Global Wellness Institute's (GWI) plans to drive change in the sector. GWI, an umbrella body which launched last year (see SB13/4 p70), has been formed to attract investment from outside the industry to fund research and support other initiatives. It was revealed that monies will be raised via a newly-developed membership

structure – with tiers starting at US\$100,000 (€78,000, £61,670) a year – for leading companies, organisations and governments which share its vision for "empowering wellness within their own organisations, cities, regions or the world". In addition to members, GWI ambassadors will provide essential support with annual contributions of US\$1,000 (€788, £622).

Via collaborative sponsorships, the GWI will look to fund best practice manuals such as one on hydrothermal areas (see p90) as well as key pieces of industry research. Since inception, the GSWS has



Economist Kjell Nordström warned about a loneliness pandemic



Watch out for 3D product printing and robots in retail said Paul Price



Celebrating Africa: delegates donned bright-coloured kaftans, ate tagine and danced in the desert under the stars at the Arabian Nights gala dinner



commissioned sector-specific studies and figures from this year's report – the 2014 *Global Spa & Wellness Economy Monitor* by SRI International – were attention-grabbing. The worldwide spa industry is worth US\$94bn (£73bn, £57bn), employs an estimated 1.9 million people and has grown by 56 per cent since 2007, it was announced. It's part of a global spa and wellness cluster which SRI values at a whopping US\$3.4tn (£2.6tn, £2tn) and we take a closer look at this data on page 94.

Outsider influence

The 2014 co-chairs Neil Jacobs and Anna Bjurström from Six Senses (see SB13/2 p30), along with GSWS president Susie Ellis, put together a roster of compelling speakers from outside the industry who provided fresh perspectives.

Retail guru Paul Price from Creative Realities looked at the shopping experience of tomorrow using technology that's yet to come and urged everyone in the room to "move technology into

your marketing department". He spoke about the importance of social commerce, pointing out that Instagram has already integrated a buy button, wearable tech (see p98) and painted a picture of an AI store. In the store, customers will be spotted using facial recognition technology and recommended purchases based on their digital profile. Although the AI store seems a while off, it does sound plausible for spas and we highlight another application for facial recognition systems in our Spa Foresight™ on page 37. Other things we've picked up on in our foresight that Price mentioned include both robots (see p33) and 3D printing (see p34) which could have huge implications for product houses.

From international architect Bjarke Ingels, delegates heard about 'hedonistic sustainability'. Using a number of thought-provoking case studies, he demonstrated how his firm, BIG, specialises in creating designs that are not only eco-friendly but also increase people's enjoyment. A standout example was an urban ski slope

he's developing around a recycling waste incinerator in Denmark. He suggested a new approach to spa architecture: "You not only have the ability, you have the responsibility to change the spaces we live in."

Prepare Yourself for the Urban Express was the theme of Swedish economist Kjell Nordström's presentation. The co-author of *Funky Business* said that "we're at the beginning of the fastest urbanisation in human history. In 2006, 50 per cent of people lived in cities. In 30 years time that figure will be 75-80 per cent. The world economy will be transformed from 200 countries to 600 cities." The trend will impact on health as well, with loneliness being a key factor. As the traditional family unit disappears, more people are living alone – even today, 50 per cent of households in most major western cities are those of single occupancy. Loneliness has severe ramifications for health and this is something else observed in the Spa Foresight™ (see p30), along with how spas might address the problem.



Delegates said 'yes' to Global Wellness Day, an initiative started by Belgin Aksoy (back centre), to encourage people to lead a healthier/better life

► Inside the industry

Each year, the GSWS sets aside time for sub-sectors of the spa industry – from education to hot springs facilities – to group together and discuss ways to tackle obstacles and to further growth. Where necessary, task forces are set up to work on points of action in between the summits to make change happen.

The focus of the **Hydrothermal Spa Forum** was the launch of the *Guide To Hydrothermal Spa Development Standards* which outlines health, safety and development guidelines of hydrothermal areas: one of the most technically complex elements of any spa. Top equipment suppliers including Design For Leisure, Barr

+ Wray and Thermarium all share their knowledge in the book which was edited by Cassandra Cavanah and is available via www.globalspaandwellnesssummit.org.

The **Hot Springs Forum** was buzzing from SRI's research which includes the first ever benchmarking of the worldwide thermal and mineral spring industry – a sector that's worth US\$50bn (£39bn, £31bn) spanning more than 26,800 facilities (see p94). It was agreed that the next move should be to measure how much money thermal/mineral spring treatments can save national health

services as this is what governments and the medical sector will take most note of.

In the **Corporate Wellness Forum**, delegates spoke about a desire for spas to come together to develop an industry-wide 'best offer programme' outlining the unique elements it can bring to corporate wellness. A relaxing environment and specialism in rejuvenation are two particular USPs that should be highlighted, they argued.

The talking point in the **Destination Spa & Wellness Retreats Forum** was a call to get behind Global Wellness Day, an initiative started by forum facilitator Belgin Aksoy who owns the Richmond Nua Wellness destination spa in Turkey. Launched two years ago, Global Wellness



We need to keep spreading the word about wellness tourism agreed delegates in the Wellness Tourism Roundtable Forum



African focus (left to right): Magatte Wade; Morocco's Minister of Tourism; and Elaine Okeke-Martin of Africa's spa association



“What we need now is for more companies to offer spa internships, as it's something that's clearly lacking in the industry”

Day falls on the second Saturday in June and the idea is to encourage people to change one thing in their lives for the better – whether its to drink more water, eat organically or to stop using plastic bottles. This June, Aksoy got celebrity support by taking Global Wellness Day to the Emmys and now she's calling for the spa community to become ambassadors.

There was lots of news from the **Spa Education Forum**. Its task forces have been busy creating a global framework for staff mentee and mentorship programmes, as well as a comprehensive internship manual which any spa can use or adapt. “What we need now is for more companies to offer spa internships, as it's something that's clearly lacking in the industry,” said forum facilitator Lori Hutchinson of Hutchinson Consulting. Work is also well underway on creating a social media and PR campaign to attract more people to the global spa workforce.

“Treat staff the same as guests and give them the same access to wellbeing”, was a takeaway point from the **Hotel Wellness & Hotel Spa Forum**. It was also recognised that if hotels and spas are to properly deliver wellness, they need to go way beyond just healthy food and look into areas such as sensory perception and brain energy.

It's no surprise that the **Wellness Tourism Roundtable Forum** co-chaired by Anni Hood, founder of Wellness Business Consultancy, and Josef Woodman, CEO of Patients Beyond Borders, was a jam-packed session. Excitement surrounding



Hot Springs Forum: new research shows the sector is worth US\$50bn and spans more than 26,800 facilities

wellness tourism – travel associated with the pursuit of maintaining or enhancing one's personal wellbeing – has picked up following the first Global Wellness Tourism Congress (GWTC) in 2013 and SRI's inaugural research showing that wellness tourism had an estimated value of US\$439bn (€346bn, £273bn) in 2012 (see SB13/4 p80). Indeed, that figure has already shot up to US\$494bn (€384bn, £301bn) as outlined on p94.

That said, the group concurred that continuing education about 'what is wellness tourism' is still required at government, public and private sector and consumer levels. Already, Yolanda Perdomo, a director of the affiliate members programme for the UN World

Trade Organization, has pledged her support in championing wellness tourism throughout the organisation. Another priority, echoing the point made in the Global Hot Springs Forum, is to quantify the economic benefit of wellness travel to the bottom line of businesses.

In summary, Hood said: “Here, in this environment, there's already great understanding and knowledge for wellness tourism. External to this, we still have many bases to cover but momentum and recognition is already evident.”

All about Africa

With the backdrop of Marrakech, a new continent for the GSWS, much attention was focused on Africa, its growing economy and middle class, and what this means for the spa industry.

The Moroccan Agency for Tourism and Investment (SMIT) was one of the key sponsors for the summit and delegates heard about Morocco's ambitious 2020 Vision which has been implemented by His Majesty King Mohammed VI (see SB10/4 p40 and SB10/2 p64). “His majesty thinks of tourism as an opportunity to create wealth and jobs,” said Morocco's Minister of Tourism Lahcen Haddad, who explained that the overall goal is to double the size of tourism in the country by 2020 – adding at least 200,000 tourist beds – to put it among the top 20 tourist destinations in the world. “We think that wellness and the spa industry is a real opportunity to help develop the tourism sector.” ▶



► Magatte Wade, the CEO and founder of Tiossan – a luxury Senegalese skincare brand – gave a powerful talk about brands embracing African culture as the spa industry grows. “There’s a need to create more jobs on the continent and the spa industry is labour intensive so it’s perfect,” she said. “But... it drives me crazy to see Asian inspired spas. Why do I not find African inspired spas?” Africa has all the right ingredients for wellness, from the varied biodiversity which brings us everything from shea butter and argan oil to traditional healers. “What we have is so rich that it’s bound to make a difference to people,” she said, adding that she’s committed to fighting for authentic African brands both within the country and outside. “The last frontier is going to be through consumer brands – this is the way that we can change the perception that the world has of Africa. That’s what you people in this room can help me with.”

Meanwhile, in separate discussion with *Spa Business*, Elaine Okeke-Martin, the president of the Spa & Wellness Association of Africa spoke about plans for the organisation to represent all spa trade associations on the continent and about setting up partnerships with them. It will have board members and advisors from the spa industry in the north (Raoul Andrews Sudre), south (Janine Shipra), east (Alison Caroline Ng’ethe) and the west (Dzigbordi K Dosoo). It will focus on developing guidelines about what an African spa concept might look like and consist of, with a goal of promoting the continent’s spa sector domestically and internationally. Okeke-Martin also said plans are afoot

Closing toast: GSWS board members and organisers raised their glasses in celebration of a inspirational event

for an association magazine, as well as a conference next September in Mauritius.

To top off the African theme, the GSWS hosted an Arabian Nights gala evening in the desert, complete with local artisans, bedouin tents, camels and traditional dancers. Delegates donned bright-coloured kaftans, dined on Moroccan tagine and danced under the stars in an evening that celebrated the best of African culture.

Mexico calling

In the final session this year’s co-chair Anna Bjurstam said: “Well, I’m standing here, with lots of ideas flying around my head. I think you’ve all had a lot of inspiration too, and I think it’s all very exciting that we’re just at the starting phase of big change [in the industry]. I’m looking forward to next year.”

Along with Neil Jacobs, Bjurstam passed the summit co-chair baton onto Gina Diez Barroso de Franklin and Alfredo Carvajal. Diez Barroso de Franklin, who was appointed to the GSWS board in January, is the president and CEO of Grupo Diari, which specialises in promoting and developing Mexican creativity. Carvajal is the president of Delos International and Signature Programs and also has a lot of knowledge about the Latin American spa market. They will help to organise the 2015 summit which, it was announced, will be held in Mexico City, Mexico.



Mexico bound: the 2015 co-chairs are Alfredo Carvajal (left) and Gina Diez Barroso de Franklin (far right)

This will be the first time the GSWS will be held in Latin America. “It’s exciting [for the summit] to be in different countries and immerse delegates in different cultures because every experience is unique,” said Susie Ellis. The urban location was specifically chosen over more well-known Mexican beach resorts such as Cabo San Lucas and Riviera Maya as it was thought that most people won’t have been there.

Delegates will be in for a treat, Carvajal concluded: “Mexico is a place where I’ve personally seen some of the best spas in the world. And we’re going to try to create a wellness offer you can’t refuse!” ●



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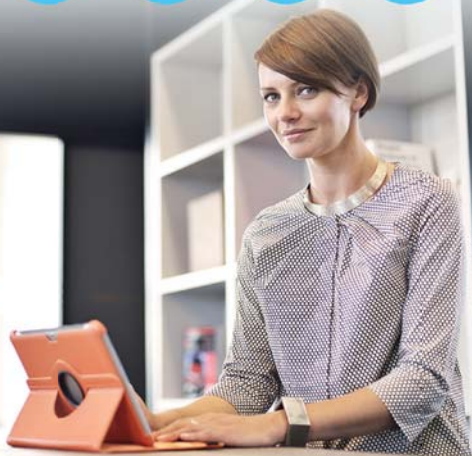
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The entire global spa and wellness cluster (including fitness) is a US\$3.4tn industry



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STRENGTH IN NUMBERS

The global spa industry has grown by 56 per cent since 2007 and is now worth US\$94bn according to a brand new study. Researcher Ophelia Yeung takes a closer look

It's been six years since SRI International released the first *Global Spa Economy* study in which it defined and measured the size of the global spa industry (see SB08/4 p40).

Many events have happened following that original study, which was commissioned by industry body the Global Spa & Wellness Summit (GSWS), including the global financial crisis, regional conflicts and natural disasters ranging from tsunamis to hurricanes and floods. So it's surprising to see that the spa and wellness industry has not only been growing but thriving. According to SRI's 2014 *Global Spa & Wellness Economy Monitor*, it's now worth US\$3.4tn (€2.6tn, £2tn). The research was revealed by SRI at the eighth GSWS held last month (see p88).

The global spa and wellness cluster outlined by SRI encompasses many industries that provide products and services to help consumers integrate

wellness into their daily lives, from what they eat and how they exercise, to how they live and work (see Diagram 1). SRI's research focuses on three components of this cluster: the spa industry, wellness tourism, and thermal/mineral springs.

Outpacing economic growth

Revenue in just the global spa industry cluster reached US\$94bn (€73bn, £57bn) in 2013, a 56 per cent growth from 2007, compared to a 31 per cent change in world GDP during the same period. While spa facilities are at the centre of this cluster, they're supported by other businesses such as spa education, consulting, media, trade associations and events and investment. All of these businesses also experienced robust expansion during this period.

During the same time, the world added almost 34,000 spas, bringing the estimated total to 105,591 spas in 2013.

Unsurprisingly, spa industry growth is not evenly distributed across the globe.

Sub-Saharan Africa and Middle East-North Africa are two regions that experienced the fastest revenue growth from 2007-2013. The spa sector in these regions is still small but stimulated by economic growth in some countries such as South Africa, Nigeria, the UAE and Saudi Arabia; and by robust tourism in others such as Morocco, Kenya, Mauritius and Botswana.

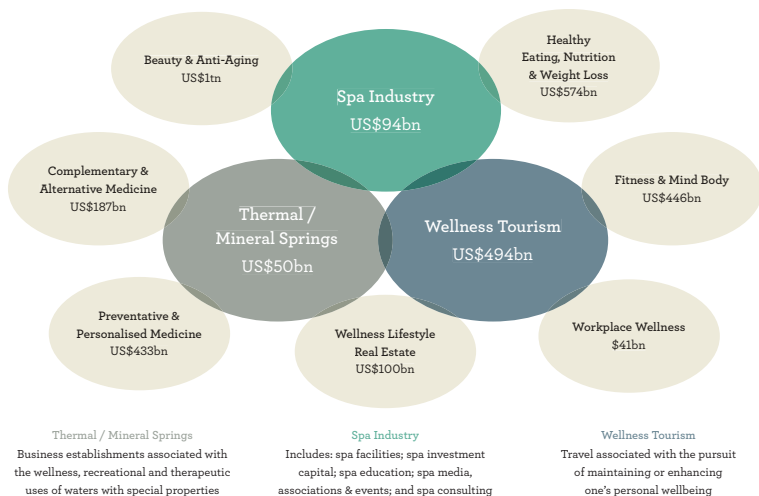
Growth in Asia and Latin America is driven by emerging markets such as China, India, Brazil, Mexico and Argentina.

Strong growth in Europe reflects the resilience of several major western European spa markets in the face of global recession such as Germany, the UK and France; and strong economic momentum to the east including Russia, Poland and Turkey.

North America, a mature spa market of which the US accounts for 89 per cent, grew modestly despite an environment of slow economic and job growth.

The five largest markets account for almost half of global industry revenue

DIAGRAM 1: 2013 Spa and Wellness Cluster: a US\$3.4tn industry*



*Note: numbers may not add up due to overlap in segments.

Source: 2014 Global Spa & Wellness Economy Monitor, SRI International

(see Table 1). Since 2007, China entered the top five markets, Russia entered the top 10, and Indonesia, Poland and Brazil entered the top 20.

However, the spa workforce needs to increase to accompany projected growth. Spas employed an estimated 1.9 million people worldwide in 2013, including about 1.1 million therapists and 200,000 spa managers and directors. If the spa industry continues growing at the same rate at which it grew from 2007-2013, then there will be a projected 2.7 million people employed by spas in 2018. An additional 500,000 trained spa therapists and 80,000 experienced spa managers/directors – above the current levels – will be needed by the industry in 2018.

Inaugural springs data

The Global Spa & Wellness Economy Monitor research included the first-ever analysis of the global thermal and mineral springs market, worth US\$50bn (€39bn,

Outpacing the economy: revenue in the global spa industry grew by 56 per cent from 2007, compared to a 31 per cent change in world GDP during the same period

€31bn) spanning 26,846 properties across 103 nations. In many countries and regions, the modern spa experience is rooted in the age-old traditions of bathing, rejuvenating and healing the body and spirit in thermal and mineral waters. This natural resource is enjoying a resurgence of interest around the world as consumers increasingly seek out authentic, natural and place-based experiences.

In the study, SRI estimated the revenues of business establishments associated

with the wellness, recreational and therapeutic uses of waters with special properties including thermal water, mineral water and seawater.

It was revealed that thermal/mineral springs without spa services are far more prevalent – they account for 20,343 establishments against the 6,504 that have spa treatment facilities. However, those springs with spa services and bathing facilities bring in significantly more revenue because, in most countries, bathing and swimming facilities alone earn low admission fees and are often traditional or rustic in nature. In fact, those establishments offering spa services earn almost twice the revenue as those without, US\$32bn (€25bn, £20bn) against US\$18bn (€14bn, £11bn) annually.

The global thermal/mineral springs industry is heavily concentrated in a small number of countries in Asia and Europe. China and Japan alone account for 51 per cent of global revenues. The

TABLE 1

Top 10 Spa Markets, 2013

	Number of Spas	Employment	Revenues (US\$ billions)	Rank in 2013 (2007 Rank)
United States	22,852	354,810	\$16.25	1 (1)
Germany	5,575	126,481	\$5.97	2 (3)
Japan	6,958	113,397	\$5.95	3 (2)
China	9,452	225,341	\$4.70	4 (7)
France	3,556	70,232	\$3.12	5 (4)
Russia	2,728	101,373	\$2.91	6 (13)
Italy	2,679	61,398	\$2.76	7 (5)
United Kingdom	2,964	52,908	\$2.51	8 (6)
Spain	2,432	45,381	\$2.14	9 (8)
Canada	3,658	42,771	\$2.04	10 (9)

Source: 2014 Global Spa & Wellness Economy Monitor, SRI International

TABLE 2

Top 10 Thermal/Mineral Springs Markets, 2013

	Number of Establishments	Revenues (US\$ millions)	Rank in 2013
China	2,160	\$14,078.3	1
Japan	17,853	\$11,687	2
Germany	1,265	\$7,520	3
Russia	776	\$3,688.5	4
Italy	756	\$1,742.7	5
Austria	124	\$928.8	6
Turkey	196	\$862.4	7
Hungary	531	\$691.3	8
Czech Republic	84	\$686.4	9
Spain	165	\$672	10

Source: 2014 Global Spa & Wellness Economy Monitor, SRI International

► top 10 countries represent 88 per cent of thermal/mineral springs establishments and 85 per cent of revenues (see Table 2).

As the renewed interest in the special properties of thermal and mineral waters continues to pick up momentum, we expect to see an increasing number of businesses built around springs in the countries where the industry is less developed. In well-established markets in Europe, many countries are refurbishing their facilities and modernising their offerings to appeal to modern wellness consumers and travellers.

Wellness tourism and lifestyle

The global spa and wellness cluster outlined in the research also included wellness tourism which SRI defines as "travel associated with the pursuit of maintaining or enhancing one's personal wellbeing". In total, this represented a US\$494bn (£384bn, £301bn) market and 587 million trips in 2013. The number of trips grew at a 12 per cent annual rate – which is significantly higher than the 9 per cent SRI previous forecasted (see SB13/4 p80).

Besides the spa industry, thermal/mineral springs and wellness tourism, the global wellness economy includes many other industries that help consumers take a proactive approach to maintain health and prevent diseases – from healthy food, weight loss, anti-aging, fitness/mind-body, to wellness real estate and workplace wellness. These additional industries that help consumers realise a wellness lifestyle add a significant US\$2.8tn (£2.1tn, £1.7tn) to the global wellness market.

Strong future

The SRI research outlined four underlying trends that suggest strong future growth for the spa and wellness economy.

The first is demographics, specifically, the growth of a global middle class. Two billion people around the world are considered middle class now. They have money beyond food and shelter to buy goods that make their lives better. This includes wellness products and services. The global middle class is expected to grow to 5 billion in 2030. The growth will primarily occur in Asia, but also in Latin America, the Middle East and Africa.

The second factor is the evolution of how consumers think about health. Around the world, people are realising that they need to adopt a healthy lifestyle to prevent or mitigate chronic diseases, many of which are related to lifestyle and stress. More consumers are interested in healthy foods, going to the gym, practicing yoga and getting a therapeutic massage. These activities are no longer considered a luxury but a part of routine health maintenance for some and to provide stress relief or pain relief for others.

The third theme is travel. Global tourism is growing fast and more people are incorporating wellness into their travel. Many are now choosing hotels that offer healthy menus, good sleeping conditions, exercise facilities and spas. Some airlines, such as Qatar airlines, are already touting



SRI revealed the research in September

their "fly healthy" advantages. The spa industry in particular will continue to benefit from this phenomenon.

Finally, we see businesses innovating to capture this growing market by creating different models to meet the price points and needs of middle-income consumers. Spa Envy has successfully pioneered a franchising and membership model in the US,

encouraging customers to get a regular massage at a low price (see SB14/2 p34). Other business such as salons and fitness centres are also adding spa-like treatments, making wellness services more accessible and affordable.

As consumers become more experienced, they also become more sophisticated and tend to value experiences that are authentic, unique to the place, or related to nature. This has given rise to a differentiation in wellness hotels and boutique resorts and also treatments that are incorporating local and traditional healing practices, ingredients and environment. We believe that continued innovation among businesses will keep the spa and wellness industries on a growth path that's firmly anchored to consumer demand. ●

To download the research for free visit www.globalspaandwellnesssummit.org



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spa business uniting the world of wellness

WEARABLE TECHNOLOGY



Jak Phillips reports on the latest innovations in wellness wearables – a market that's expected to be worth US\$8bn by 2018

Apple and Google are pouring millions into the wearable tech market, which is also attracting a host of exciting, innovative start-ups.

The global wearable electronics market is expected to reach revenues of US\$8bn (£6.3bn, £5bn) by 2018, with health and fitness trackers representing 61 per cent of the sector.

The ramifications for health and wellbeing are huge. Medical institutions are already using the technology to monitor patients' vital signs – aiming to identify problems early – and there's the potential for spas to monitor customer biometrics as well. They're being integrated with

corporate wellness programmes too as employers harness information from trackers to determine employees' health insurance premiums. Many feel that this is just the start for wearable tech, which has the potential for seamless integration with the 'internet of things' – the advanced connectivity of devices, systems and services – as it gains momentum.

With this in mind, we look at the latest innovations in the wellness wearables market to work out which ideas are likely to leave rivals stuck in the starting blocks.

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Muse measures brainwave activity and an integrated app teaches wearers how to meditate

MUSE HEADBAND

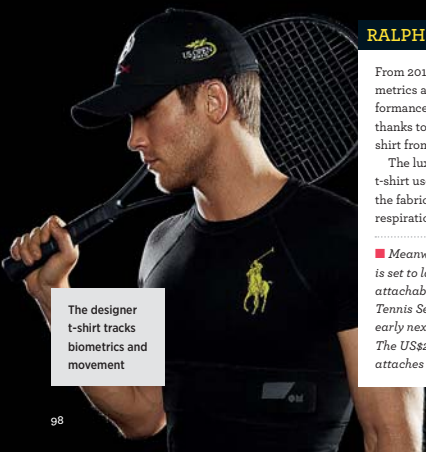
The Muse headband by start-up firm InteraXon has been designed to help people meditate.

Marketed as a product to help manage stress, the Muse reads and measures the user's brainwaves to paint a picture of how brain activity is affected by emotions. It also comes with an integrated brain health application which teaches meditation.

The device rests on the ears like a pair of glasses and teaches wearers how to calm their brain by using computer-guided meditation in the form of cranial training app Calm.

Among the benefits of decreasing brainwave rhythm using meditative techniques are the production of endorphins and dopamine, in addition to better memory, attentiveness and empathy, say Muse's makers.

The device uses a rechargeable battery and is compatible with iOS, Mac and select PC operating systems. It retails at around US\$299 (£220, £178).



RALPH LAUREN POLO TECH T-SHIRT

From 2015, tennis lovers can record metrics and data from recent performances to improve their game, thanks to a movement tracking shirt from designers Ralph Lauren.

The luxury brand's Polo Tech t-shirt uses sensors knitted into the fabric to read heartbeat, respiration and other biometrics.

■ Meanwhile, Sony is set to launch its attachable Smart Tennis Sensor early next year.

The US\$200 (£152, £121) device attaches to rackets to record up

to 12,000 shots of swing and serve data, which also captures movement and direction metrics.

These findings, along with data related to energy output and stress levels are sent to the cloud and will be viewable on a tablet or smartphone.



to 12,000 shots of swing and serve data, with findings transferred to a smartphone

app that can be shared with friends via social media.

The designer t-shirt tracks biometrics and movement

The wireless earphones relay health and fitness metrics and stream music via voice commands



FREEWAVZ EARPHONES

Technology designer FreeWavz is creating a set of earphones to collate health and fitness metrics and audibly relay the information to cyclists and joggers so they don't have to take their eyes off the road.

Designed by otolaryngology specialist Dr Eric Hensen,

the earphones will operate without the need for any other wearable tech, also offering wireless connectivity to music streaming, a step counter, plus heart rate and oxygen saturation monitoring.

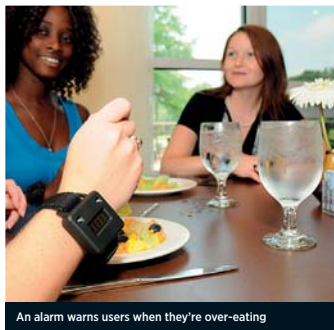
Hensen came up with the idea because he was frustrated by poorly-fitting

headphones that often disrupt workouts when they fall out or cause injuries when the wires become entangled.

The product will allow exercisers to change or pause music through voice commands and can connect to a smartphone to collate health metrics.

The earphones also feature an extra speaker above the standard earbud that allows users to listen to music while also keeping ears alive to the sound of passing cars.

FreeWavz has just raised US\$325,000 (£251,000 £200,000) for its first production run starting in January 2015.



An alarm warns users when they're over-eating

BITE COUNTER

While many of the wearable technology featured here focus on health from an exercise perspective, the Bite Counter bids to remedy the developed world's obesity crisis by discouraging overeating.

The counter has been designed as a wristwatch to detect, count and display the number of bites its wearer takes each day, to serve as a visual red flag against over-indulgence.

It uses wrist-motion tracking to count bites and

estimate calories, while an alarm buzzer can also be set to warn users when they're nearing their daily bite count limit.

Developed by researchers based at South Carolina's Clemson University in the US, the Bite Counter tracks consumption levels over long periods. This creates a log of activity from which users can analyse when they're eating most and least, allowing for changes and plans to be made to manage weight.



Prices for the watch start at US\$359

APPLE WATCH

Apple debuted its long-awaited smartwatch in September, with a host of health-related functions.

The Apple Watch can record pulse rate and connect to an iPhone to track movement, pace and distances travelled. While an accelerometer can measure the quality and intensity of body movements.

There are two specific health and fitness apps: Fitness and Workout. The Fitness app tracks all types of activity, with a series of visual 'rings' signifying progress towards goals. Workout facilitates fitness plans and displays workout metrics in real-time on the watch.

In addition, Apple has moved to unify the fragmented health-tracking market by launching its Healthkit platform (compatible with the watch). The platform has been designed to pull in data from third-party health apps and present the info in one manageable dashboard.

The Apple Watch is due to ship in early 2015 and prices will start at US\$359 (£270, £216).

PAVLOK

Be it sleeping in or skipping the gym, everyone wishes they could kick those bad habits that prevent physical activity. Now, a new wearable is bidding to not just track activity, but use pain and shame to ensure users have no choice but to reach their goals.

Due for release in 2015, Pavlok is a fitness tracking wristband which also serves as a behavioural conditioner and the pre-order price is US\$149.99 (£118, £92). Aside from the

The fitness tracking wristband delivers a 340v static shock if wearers slip into bad habits



usual tracking of steps, activity and sleep, the device has the ability to give away your money, shame you on social media, or even deliver a 340v static shock if you slip back into bad habits. It also offers rewards – as yet unspecified – as well as encouraging social media

posts if you stay on the straight and narrow.

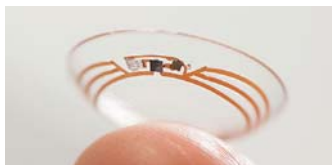
Triallists have mainly been using the device to help programme their body to wake up earlier and carry out more exercise, although there's clearly potential for it to be applied to diet control and smoking cessation as well.

GOOGLE SMART LENS

In addition to its much-vaunted Glass product, Google is working on developing some 'smart contact lenses.'

Announced in January, Google plans for the lenses to be able to monitor blood sugar levels via an antenna smaller than a strand of human hair – opening up new methods of self-management for chronic diseases such as diabetes, as well as other tracking uses applicable to fitness.

With a camera potentially being used in the lenses, people's vision



Google is aiming to have a prototype ready next year

could be corrected much like the auto-focus on a camera. This could create a new realm of interactive opportunities for the visually impaired in terms of sport participation, as

well as a number of virtual reality applications.

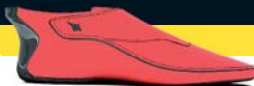
Google is partnering with pharmaceutical firm Novartis to take the project forward and aims to have a prototype in 2015.

LECHAL TRAINERS

While so much wearable technology has so far focused on wristwear, a company from India wants to get to the sole of fitness tracking through its Lechal wearable tech trainers.

Ducere is currently taking pre-orders with a view to a late-2014 release for its interactive haptic feedback footwear.

The full shoes are built with bluetooth-enabled insoles (which can also be bought separately) that connect to a



Blue-tooth enabled insoles measure vibrations and connect to a smartphone to provide user-feedback

smartphone and provide user-feedback through insole vibrations. The shoes can connect to Google Maps, enabling directions to be disseminated without the need

to look at a screen – handy for running on busy streets – while the usual pedometer/calorie counter is also present.

Ducere has indicated that the insole will be priced at US\$100 (£75, £59), with the cost of the shoes likely to be similar.

The creators were initially developing a shoe designed for the visually-impaired – who can buy Lechal at a discounted rate – before realising the concept had broader applications.



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SPA SOFTWARE

OPERATOR CASE STUDIES PART FOUR

We take a look at how spas around the world are using software to boost their business

Overcoming language barriers with SpaOne

Centara Resorts & Spas' extensive network in Asia predominantly covers locations where English isn't the first language and the computer literacy of some users is limited. Selecting software was therefore a difficult task and eluded Spa Cenvaree, the spa arm of Centara which has 30-plus facilities, for years before it discovered SpaOne.

An extensive period of trials and testing confirmed SpaOne's system met all requirements, and the Australian-based software provider was also able to offer the aftercare support Centara was looking for, with the ability to operate in an Asian time zone. Tara Hanrahan, group director of spa operations at Centara, says the software "provides the functionality components essential for a multi-national company and is executed with the simplicity and ease of push-button reporting".

Hanrahan says the implementation of the SpaOne software has ensured operational consistency throughout the group, which is particularly important for reporting so the company's various locations can be compared. The use of cloud-based technology to conduct



Hanrahan uses SpaOne to check guest nationality and tailor offers accordingly

off-site management via remote access is a key component for Hanrahan herself, who says she's able to better track nationalities, average spend and capture rate per segment so each spa can create targeted marketing campaigns for the different channels.

"Through using SpaOne at our Centara Grand Mirage Beach Resort in Pattaya, Thailand, we found that our Chinese guests had one of the highest average spends of any nationality, Russian guests had the highest re-booking rate and Thai guests loved a special promotion. We were able to use this information and produce focused promotions that worked," she explains.

Spa-kit.net Keyword: **SpaOne**



Using the software, the group can see what areas of the business need more attention

Camelot picks ESP Online to shed light on buying habits

With 21 spas across southern Africa, Camelot Spa Group required a software system that could combine information from all its branches to deliver accurate statistics. It selected software from South Africa's ESP Online to do this.



Debbie Merdjan

Camelot owner Debbie Merdjan has made full use of the reports to understand her customer mix and buying habits. "We're able to view the more popular treatments and packages and see what areas in the business need more attention," she says.

Knowing what clients want means marketing can be directed in the right areas, thus producing better results. ESP Online's system can also perform a detailed weekly stocktake, which helps Merdjan find any losses or inaccuracy in stock levels so that wastage and loss of revenue doesn't occur.

Other features of the system that have impressed Merdjan are the web interface, which gives Camelot the opportunity to remotely view a spa's data "to know exactly what is happening in the business by viewing the different reports". There's also a computerised bookings and rosters module that enables the company to "accurately track staff performance and make sure that all bookings and sales are being accounted for".

Spa-kit.net Keywords: **ESP Online**



ESP software gives guests the convenience of planning their own spa itinerary

“The system is effective visually and easy to navigate. It’s easy to search availability and provides the ability to manage retail stock and rota management of therapists”

Center Parcs spa guests book online thanks to ESP Leisure

ESP Leisure software was introduced at the new Aqua Sana spa at Center Parcs Woburn Forest in the UK (see SB14/3 p74) to provide an online booking service for guests. Kerry Fenton-Kent, group Aqua Sana manager, says customer demand now fully drives rotas, where historically at the company’s spas it was the other way around, with all bookings being made via a contact centre or once they arrived on-site.

The result is reduced queues on arrival at the Aqua Sana booking desk while the software also gives the guest the convenience of planning their own itinerary. Day-to-day management of therapy columns has also become even more efficient, according to Fenton-Kent.

The ESP software was already in use in other areas at Center Parcs villages such as leisure booking and cycle centres, so installing it at the Aqua Sana spas meant



Kerry Fenton-Kent is the group manager of five Aqua Sana spas

using one leisure system across the board and receiving one suite of reports.

“The system is effective visually and easy to navigate. It’s easy to search availability and provides the ability to

manage retail stock and rota management of therapists,” says Fenton-Kent. “We have a good relationship with ESP and continue to work with them developing the system.”

Spa-kit.net Keywords: ESP Leisure



Deep Nature manages more than 40 spas and uses ADN software in most of them

“A reliable management tool is essential for the running and profitability of a spa facility where the difficulty is not to create a spa, but to create one that makes money!”



Deep Nature president Julien Patty

Deep Nature says ADN is a reliable management tool

French company Deep Nature offers 420 treatments per day at the 40 spas it manages for luxury hotel, residences and cruise ships worldwide (see SB14/3 p32). President and founder Julien Patty describes ADN's Nymphéa software as a complete solution which enables “interactivity between our teams, and which perfectly meets the requirements of large profit centres”.

Used in most Deep Nature spas, the software can interface with hotel property management system (PMS) software, which Patty says allows the company to post spa invoices to the client's room and helps “manage inter-service with ease”.

Patty also particularly appreciates the 365 days-a-year hotline and the

high level of customer service at ADN. “With spas located all around the world, like in Bora Bora, which is 12 hours behind France, the hotline availability is more than important,” he says. “A reliable management tool is essential for the running and the profitability of a spa facility where the difficulty is not to create a spa but to create one that makes money!”

Nymphéa optimises client mailing based on consumption patterns and provides accurate statistics on treatments and products with daily, weekly, monthly and/or annual figures. The software also allows Deep Nature to create promotional campaigns and to measure direct returns.

Spa-kit.net Keyword: ADN

Millennium picked after exhaustive search

Angela Cortright, principal at the Spa Gregorie's day spa chain in California, describes herself as a computer industry veteran.



Angela Cortright

She conducted an “exhaustive analysis” before selecting “user-friendly yet powerful” software from Millennium.

“I was impressed with the robust feature set, the dedication of the company to staying on the leading edge of technology, its culture and its customer support,” she says.

Cortright says that the three Spa Gregorie's make rigorous use of Millennium's analysis tools to improve operations. These cover areas such as inventory turns, most and least popular products and services, therapist productivity, yield management, traffic patterns and revenue patterns. The data is then reviewed and discussed at monthly, and in some cases daily, management meetings in order to “set direction for profitable strategies”.

The fact that Millennium's software is user-friendly helps to reduce errors and training costs as employees can be quickly brought up to speed in using it. Cortright also says the system is smart enough to help prevent mistakes such as double booking or ring out errors that, in turn, save money.

Finally, the marketing tools on offer have proved to be a great help in improving revenue. “We're able to pinpoint customers who meet certain criteria, such as frequency of visit or purchase patterns and market to them,” explains Cortright.

Spa-kit.net Keyword: Millennium

Millennium helps to “set direction for profitable strategies”





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NAILCARE

We ask nailcare suppliers about their spa offering, why nail treatments are good for business and what the latest trends are



Mine lacquers feature precious metals - a bottle starts at US\$75

MINE

"Luxury is always in fashion," according to Velela Vancza, the creative director of US-based Mine which offers nail lacquers exclusively pigmented with precious metals such as gold, fine silver and pewter.

The lacquers, which retail with an equally exclusive price of US\$75-US\$500 (£59-£394, £46-£308) a bottle, allow customers to accessorise their fingertips with genuine precious metals. Vancza says spas should couple the lacquers with their own nailcare-focused services to create a more holistic option and suggests an add-on cost of US\$25-US\$75 (£20-£60, £16-£47) depending on the product chosen.

Two of Mine's key spa accounts are The Miami Beach Edition spa in



the US, with the tie-up beginning in November 2014, and the Mandarin Oriental Tokyo spa. The Mine range includes 10 lacquers, three base coats, and five top coats.

Spa-kit.net keyword: Mine



JESSICA / GERRARD INTERNATIONAL

Jessica has an adaptable menu of treatments dependent on an individual spa's needs and the time a client has available. A half hour manicure typically costs £21 (US\$34, €27) and begins with the hands and cuticles being conditioned and moisturised. Nails are then shaped and treated with a prescriptive basecoat before a polish is applied.

The company has more than 250 custom colour shades and over 150 GELeration Soak-Off gel colours, which Mandy Cook, sales director at UK distributor Gerrard International says is currently the most popular product, citing the choice available and the fact that it dries instantly.

Cook also notes that manicures and pedicures work extremely well when performed alongside other spa treatments. "A relaxing Zenspa pedicure partners perfectly with an Indian head massage, or a LeRemedi hand treatment is ideal when performed during facials while a masque develops," she says.

Spa-kit.net keyword: Jessica

CND / SWEET SQUARED

Nails are finally at the forefront of the beauty industry and spas would be "crazy not to" offer treatments and services, according to Samantha Sweet, the co-founder of Sweet Squared which distributes CND in the UK and Ireland. She says, they simply give the customer "instant gratification".

There are around 14 different nail treatments/services and its most popular in spas is a manicure/pedicure using Shellac, the 14+ day colour wear polish designed to give nails a mirror shine without damaging them. The company also offers CND's



Vinylux weekly polish and Color Clubs Ruby & Wing colour changing polish. In total, there are around 200 shades with new seasonal collections introduced every year.

With the company doing more nail art classes than almost any other class in its repertoire, Sweet would recommend

that spas get in on this trend, focusing on simple, elegant or avant-garde looks that don't take too long. "Keeping it simple works best for the spa environment, can be extremely effective and not hard to create," she says.

Spa-kit.net keyword: CND



CND recommends that spas get in on the nail art trend

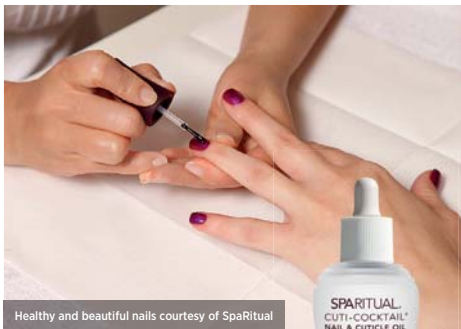
ESSIE

Essie strives to make its polishes a 'girl's best friend', with its 250 core shades, plus fashion-focused seasonal collections. Driven by owning company L'Oréal, innovations include a "good for you" gel colour and hydra-resurfacing technology which is used in Essie's newly launched spa ranges.

The company's Spa Pedicure, which includes a massage designed by the head physiotherapist of the New York Ballet, is popular in spas. The treatment lasts 75-90 minutes and Essie suggests it should be priced in-line with other luxury spa services.

Essie describes a deluxe manicure/pedicure as the ultimate indulgence which allow therapists to build a stronger relationship with clients. They make a great starter treatment for those unsure about the more in-depth spa services.

Spa-kit.net keyword: Essie



Healthy and beautiful nails courtesy of SpaRitual

SPARITUAL

A desire for healthy and beautiful nails is a perfect trend for spas, says a spokesperson at SpaRitual, adding that nail services make an excellent extra for guests and offer spas with an additional revenue stream.

The company supplies eco-friendly, vegan polishes at a number of high-end spas around the world such as Spa Village Ritz-Carlton in

Malaysia, Talise Spa in Dubai and Mandarin Oriental in New York.

It offers a wide range of polishes and nailcare products such as the Handprint Hand Serum and Salve and Cuti-Cocktail. Its treatment protocols include four hand and foot rituals and a Slow Beauty Body massage.

Spa-kit.net keyword: SpaRitual



Orly says that a seasonal approach to colour is a must

ORLY

A seasonal approach to nail colour is essential and nail art is now a must-have service for spas looking to move with the times, according to Orly. Aiming to take a leading role, the company is offering a half-day and full-day art and design course for spas. Orly prides itself on creating spectacular nails at a range of catwalk shows by fashion designers such as Amanda Wakeley, Jean Pierre Braganza and Felder+Felder.

It says customers are also looking for added benefits beyond just colour, and Orly has included vitamins in its polish and gels to ensure nails are cared for and protected while building strength and length.

Orly has more than 160 polishes in its core range, with the aim of creating high-shine, high-definition nails, and offers upwards of 300 ancillary products. Around 10 treatments are currently offered, developed by a dedicated education department, and start from between £15-£20 (US\$24-US\$32, €19-€26) for a 30-minute express manicure.

Spa-kit.net keyword: Orly



Mavala offers more than 240 polish shades, plus 300 nailcare products

MAVALA

Lynn Gray, creative director at Mavala, recommends that spas include hand and foot services as they are an affordable finishing touch for clients. Its luxury treatment – Platinum Spa Manicure and Pedicure – is its most popular and includes cuticle work, a nail scrub, a hand and foot scrub and mask, and finishes with a luxury massage and polish. Each client receives a complimentary nail polish at the end of the treatment with the 75-minute spa manicure costing around £36-£41 (US\$58-US\$66, €50-€52) and the

60-minute spa pedicure usually priced at £26-£36 (US\$42-US\$58, €33-€50).

Gray says it's vital for spas to carry out therapist training in treatment and product knowledge to ensure services are of the highest standard.

Mavala distributes to more than 130 countries and has a presence in hundreds of spas. Its polishes are available in over 240 shades, while a range of more than 300 products for the care of nails, hands and feet is also offered.

Spa-kit.net keyword: Mavala

LEIGHTON DENNY

Key international accounts for Leighton Denny include Claridges New Delhi, W hotel Bangkok and the Waldorf Astoria in Berlin.

The company has designed more than 16 manicure and pedicure treatments, as well as a gel polish, and says these can help spas connect with a broad range of new clients from cash-rich time-poor guests or those who have a limited budget. Nail treatments can also be a way to create a social area for regular guests to meet.

While gels have taken the industry by storm, according to international sales & marketing manager Nathaniel Hibbs, they can be less popular at spas as a more holistic approach is traditionally favoured. However, "if you position your nail [service] area away from relaxation and treatment rooms and you

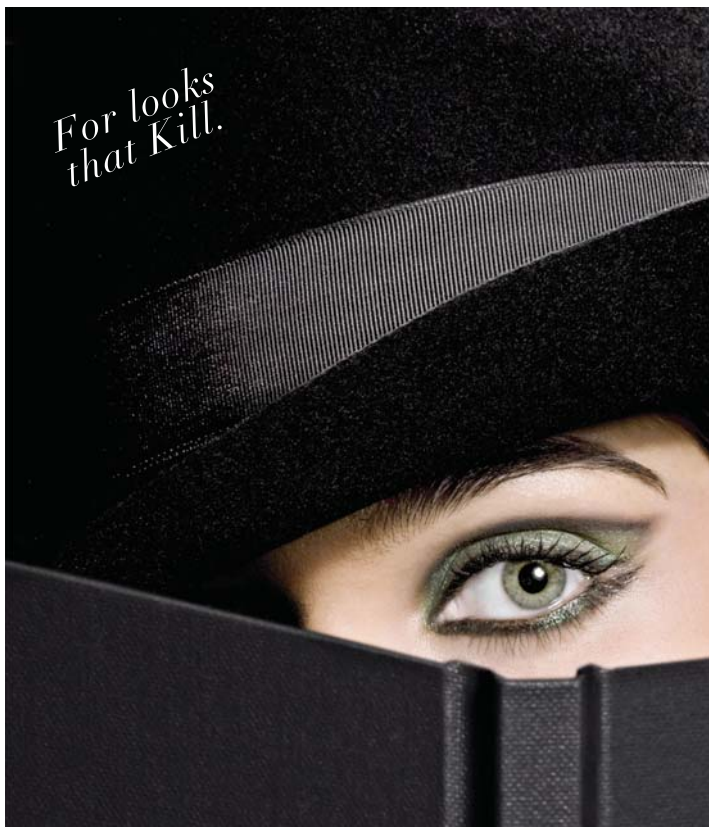


The 16 different nail services help spas connect with a broad clientele

can contain the smell and noise", they could yet prove a hit, he says.

Spa-kit.net keywords: Leighton Denny

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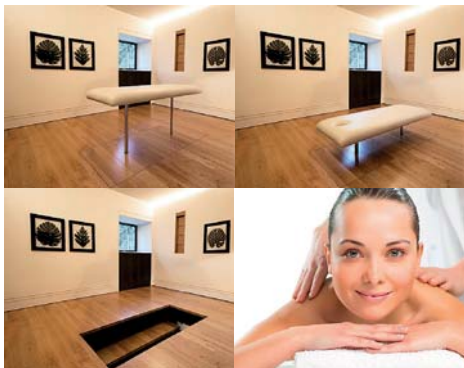


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A floating massage table in a secret panel

A cantilevered 'floating' massage table which can be neatly hidden under the floor when not in use could add a new, flexible element to spa design. The sub-floor elevating bed means the space can double up as a gym and although the installation was for a private residence in London, UK, it could be taken up for a commercial project too.

When not in use, the massage table retracts completely beneath a panel that sits flush with the gym floor. When the bed is needed, the panel slides away and the massage table

risers up and locks into place – all in 40 seconds. It rises to a height of 90cm, but this can be adjusted.

The two specialist companies behind the design were Meia, a manufacture of automated moving architectural elements such as sliding/hinged roofs; and HepcoMotion which custom-made the linear actuator and motion products which included Zimm screw jacks and Winkle bearing systems from its existing range.

Spa-kit.net keywords:

HepcoMotion / Meia



Sauna chair for physically disabled

Saunasella, a Finnish company which makes chairs for heat experiences, has launched a sauna chair for physically handicapped people such as the elderly and disabled. The Fortis chair offers a greater seat height and width and has been designed to be safe and stable. With support armrests, it's easier and more comfortable for people to sit and get up.

The chair can also lean backwards to provide optimum back support, while an optional footrest gives support for shorter individuals. Others who can benefit from the chair are those recovering from surgery, pregnant women, people with reduced mobility or sufferers of balance disorders. The chair is made using 100 per cent natural materials.

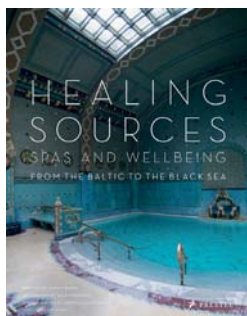
Spa-kit.net keyword: Saunasella



Salt bed for skin and lung therapy

Salt therapy is becoming increasingly popular in the spa industry, and the S.A.L.T Bed seeks to provide a health and wellness experience in as little as 15 minutes. The enclosed dry salt unit has an adjustable halogenerator for both individual skin and lung therapy. Built-in colour changing ambient lights and stereo speakers provide a multisensory and relaxing experience, and the machine also features a UV sanitation light.

Spa-kit.net keyword: S.A.L.T



Book explores wellness cultures in Europe

Readers can take a journey through the rich and varied wellness cultures of eastern and central Europe in a new book – *Healing Sources – Spas and Wellbeing from the Baltic to the Black Sea* – that's being published in December. A number of the region's wellbeing approaches are based on the power of natural resources, such as respiratory healing in Poland's salt mines and mud pools in Slovakia, and author Sophie Bengt has also written a series of reports on such therapies



Original photos and tales focus on the region's natural remedies and wellbeing facilities

for *Spa Business* magazine (see p58). *Healing Sources* combines tales from history and of famous visitors with photographs of the region's architecture, landscape, food and natural remedies. Spa-kit.net keyword: Prestel



Asian-inspired accessories by Saakalya

A new range of Asian-inspired accessories is being offered to spas courtesy of Saakalya Collection. The range, which has been sourced from local suppliers in south-east Asia, includes driftwood tables and floor lamps, a variety of ceramic dispensers, bamboo baskets, frangipani candles and a number of textile designs. Other items can be sourced, created or customised on request.

Spa-kit.net keyword: Saakalya

Lemi launches a contrast therapy room concept

Lemi has created two pieces of equipment and developed a massage technique all based around the principle of thermal contrast therapy – in which alternating hot and cold stimuli are used to activate the immune and circulatory systems.

The Spa T* – Room concept features the Spa Dream Q spa table with a bed of heated quartz particles. Meanwhile, the T* – Vale multi-function trolley, which can hold up to 20 towels, has a hot cabi and a cold cabi as well as a heating plate for oils, body wraps and cosmetic products.

Together the two pieces of equipment support the T* – Massage technique which Lemi provides training in. In the treatment, customers lie down on the quartz surface enveloped in warmth



and light, after which hot and cold scented towels are placed on the body. It culminates with a deep-tissue massage which has been designed by holistic therapist Giuseppe Damiani to reduce muscle tension and decrease lactic acid to provide an overall sense of wellbeing.

Spa-kit.net keyword: Lemi



Trio of technologies in Thalgo's iBeauty

Thalgo's new iBeauty machine combines sound-vibration, ultrasound and radiofrequency technologies. The professional-only device features three short programmed treatments of 30-45 minutes which cover purifying, hydrating and anti-ageing and the iBeauty can also be used as part of any Thalgo facial to enhance efficiency and results.

Spa-kit.net keyword: Thalgo

Heavenly new body oil from Voya

One of the world's first certified-organic seaweed oils for retail has been launched by Voya. The nourishing body oil, Angelicus Serratus, takes its name from a seaweed known as the Angel's Kiss from the Ocean, which is the primary ingredient. It's been created to help improve suppleness and elasticity while purifying and cleansing tired skin. Angelicus Serratus is the first Voya product to feature the company's new packaging made from seaweed and other responsibly-sourced materials.

Spa-kit.net keyword: **Voya**



Elemis' bright idea for skin pigmentation

With ingredients including daisy and pea extracts, a new brightening serum by Elemis is designed to reduce the appearance of uneven pigmentation. Advanced Brightening Even Tone Serum also targets dark spots and existing imperfections while helping to minimise future formation, with clinical trials proving its effectiveness in 28 days. Pea extract inhibits the production of melanin, the main cause of skin pigmentation, while daisy extract has a natural skin-lightening effect.

Spa-kit.net keyword: **Elemis**



Spaliance introduces pre-filled Orbser

Spaliance has launched Orbser – disposable aluminium 'pods' pre-filled with skincare products. The Orbser are designed to be used with the Orb, a portable, continuous heat chamber for warming skincare products. The advantages are that the Orbser allow exact portion control, are hygienic and have been created to be easy to use. There are two Orbser variants: Nourish is a balancing treatment masque for the face, while Refresh is a revitalising treatment wax for use in manicures and pedicures.

Spa-kit.net keyword: **Spaliance**



Natura Bissé makes Shock move in skincare

Spanish skincare company Natura Bissé has relaunched its Essential Shock Intense line with new ingredients. The fresh formula is centred around ingredients including aminoessence cocktail, rosa mosqueta oil, iris florentina root, concentrated ananas extract and vitamins C, E and F. The five products in the line include a lip and eye cream to restore hydration and firmness and a gel cream to combat dryness and help with anti-ageing.

Spa-kit.net keywords: **Natura Bissé**

Dual nourishment from Elemental Herbology

Elemental Herbology has two new nourishing products. Hand Nutrition features omegas 3, 6 & 9 and aromatic plant oils to moisturise dry and sun-damaged hands. Active ingredients include pea extract, apricot butter and keratin. Nutritive Lip Complex uses natural plant peptides to plump lips and hydrating bio-oils.

Spa-kit.net keyword: **Elemental**



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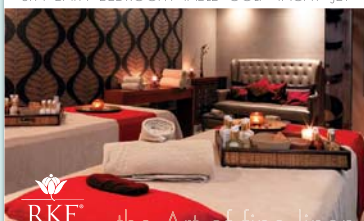
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FAST ACTION

A groundbreaking study has found that fasting can help regenerate the immune system and could have a role to play in healthy ageing

Abstaining from eating for a period of two to four days at a time not only helps to protect the immune system from damage, but also leads to cell regeneration according to a groundbreaking new piece of research*.

Scientists at the University of Southern California (USC) in the USA say this is the first time a natural intervention has been found to trigger stem cell-based self-renewal of an organ or system. And the findings could have major implications for healthy ageing.

As people get older, their immune system declines, making them more susceptible to disease. Being able to prevent or reverse this process could help older adults as well as those who suffer from autoimmune disorders. It may also benefit cancer patients whose immune systems are weakened by chemotherapy.



The study's lead author, Valter Longo, is a director of the Longevity Institute at USC

Flipping the switch

Over a course of six months, the scientists looked at the impact prolonged fasting cycles had on mice and patients undergoing chemotherapy. During this time, the mice and people went without food for two- to four-day periods.

In both cases, not eating initially lowered the white blood cell counts – the cells in the immune system that defend the body against disease. And the body started killing off old or damaged cells. “When you starve, the system tries to save energy and one of the things it can do to save energy is to recycle a lot of the immune cells that are not needed, especially those that may be damaged,” explains lead study author Valter Longo, a professor of gerontology and biological sciences at USC.

Eventually, however, prolonged periods of fasting in mice then “flipped a regenerative switch” which kick-started the stem cells into producing brand new white blood cells. This essentially rebooted the whole immune system.

“Now, if you start with a system heavily damaged by chemotherapy or ageing, fasting cycles can generate, literally, a new immune system”

The PKA enzyme

Importantly, the scientists also found, that when people don't eat for long periods, levels of the enzyme PKA are reduced. In previous studies, PKA has been associated with the regulation of stem cell self-renewal.

“PKA is the key gene that needs to shut down in order for these stem cells to switch into regenerative mode,” clarifies Longo. “It gives the OK for stem cells to go ahead and begin proliferating and rebuild the entire system.”

“And the good news is that the body got rid of the parts of the system that might be damaged or old, the inefficient parts, during the fasting. Now, if you start with a system heavily damaged by chemotherapy or ageing, fasting cycles can generate, literally, a new immune system.”

Prolonged fasting also lowered levels of IGF-1, a growth hormone linked to ageing, tumour progression and cancer risk.

Further research by Longo and his team will now focus on whether fasting has a similar impact on different parts of the body other than the immune system.

Fasting in spas

Given its link to spirituality and naturopathy, fasting is a good fit for spas. But how can operators get the best results and ensure customer safety? We explore these ideas further on page 50. ●

*Longo, V et al. Prolonged Fasting Reduces IGF-1/PKA to Promote Hematopoietic-Stem-Cell-Based Regeneration and Reverse Immunosuppression. *Cell Stem Cell* 14, p810-823. June 2014

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