

spa business

INTERVIEW

CHRISTOPHER NORTON

*Overseeing 50 new
spas for Four Seasons*

SPA SPOTLIGHT

**Montenegro,
Morocco
and the UK**



SPA PHILANTHROPY:
The art of giving well

JOAN LUNDEN

The woman who created the Camp Reville spa getaway

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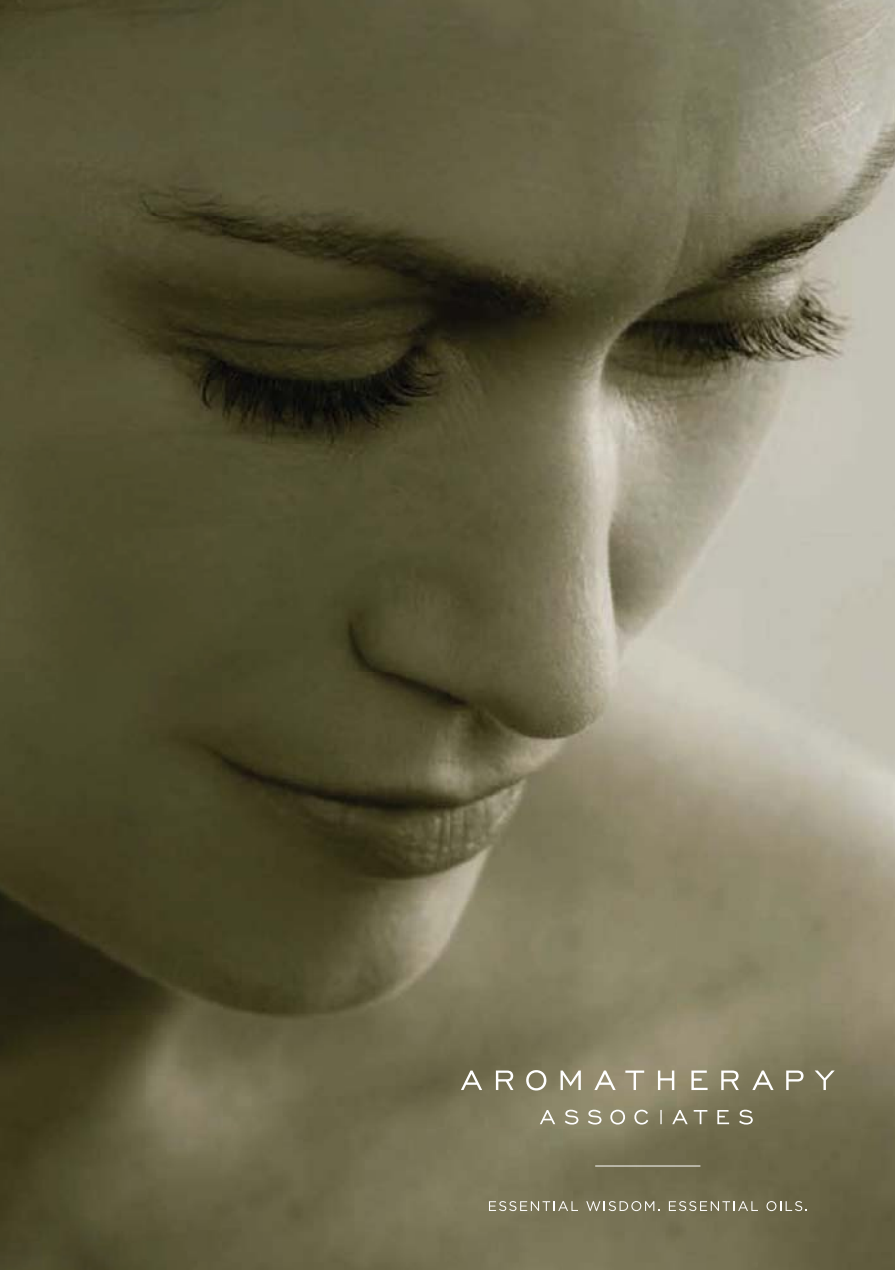
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Anni Hood is a leading global spa and wellness expert. She specialises in the conceptual development, performance optimisation, strategic planning and brand expansion of spas. She is also the founder and visionary behind KIS Lifestyle® – a new pro-active health and wellness concept.



Andrea

Jezovit

Andrea Jezovit, a native Canadian, has written on business, travel and lifestyle for publications including *Canadian Business* and *Toronto Life*. She now lives in the UK and is working towards a Masters in Electronic Publishing. Previously, she was also a managing editor at Leisure Media.



Jennifer

Harbottle

Jennifer Harbottle has been a regular contributor to *Spa Business* magazine for the last six years and has established herself as a leading commentator in the industry. Currently based in India, she focuses on writing about the Asia-Pacific leisure sector.



Rhianon

Howells

Rhianon Howells was the launch editor of *Spa Business* and established it as a journal of note. As consulting editor, she is closely involved with its continuing development, while also writing widely on health, fitness, travel and leisure as a freelance journalist.



Terry

Stevens

Dr Terry Stevens is the managing director of UK-based leisure and tourism consultancy Stevens & Associates. The company specialises in strategic planning, with a focus on changing market trends, especially in the context of health and wellbeing tourism.



ON THE COVER

Joan Lunden created *Camp Reveille*, a women's spa camp in the US (see p46)

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EDITOR'S LETTER

More than mediocre

If I want a technical massage, very complex soft tissue work or other specific bodywork, I have to confess, I'd be unlikely to visit a spa.

Most of the treatments I have which make a fundamental difference to my body are carried out in dingy treatment rooms with hard beds and strip lighting: one therapist I visit works in a space which is little more than a cupboard.

Yet these specialists – practising in the field of complementary medicine – are world-class and normally booked solid for weeks or even months ahead.

My spa experiences are generally the opposite – fabulous facilities, and service, but when it comes to therapeutic value or the level of advice on offer, they often fall short.

Occasionally it comes together in a beautiful spa with a great therapist to create an outstanding experience, but this is unusual – I'd say 15 per cent of the time. Of the rest, the best you can say is they're satisfactory and (hopefully) don't do any damage.

Unfortunately, the recession has created a situation where it's increasingly difficult for spas to offer this compelling combination. This is partly because many operators have responded to falling revenues by hiring more part-time therapists who have less time for training and partly because training budgets have been cut back.

There's also been an understandable drive to commercialise and streamline the experience, meaning treatments are often standardised, rather than personalised to the individual.

But the main reason is that we're still failing to engage with therapists working at the more curative/medical end of the spectrum where these higher skill levels are often found.

The industry needs to drive volume to keep up with its own ambitious growth targets, because visits-per-spa have been



People are prepared to pay regularly for great treatments which improve their quality of life, health and wellbeing. They're not prepared to pay for fluff and at the moment, unfortunately, that's often what you get when you visit a spa

falling steadily since the late 90s as the number of spas has grown. In the US, for example, visits per spa per year stood at over 16,000 in 1999, but are now below 7,000 (see p34).

Unless we can make a spa visit an essential part of people's body maintenance rather than a discretionary extra, we won't achieve the volumes necessary to fill the spas that are being built. People are prepared to pay regularly for great treatments which improve their quality of life, health and wellbeing, they're not prepared to pay for fluff and at the moment, unfortunately, that's often what you get when you visit a spa.

There's a danger that the balance sheet is driving the industry – there's just too much emphasis on the bricks and mortar and not enough on the treatments and quality of experience. We need to refocus on offering personalised, effective, therapeutic services if we're going to build up the valuable regular custom which will really underpin enduring success.

Liz Terry, Editor

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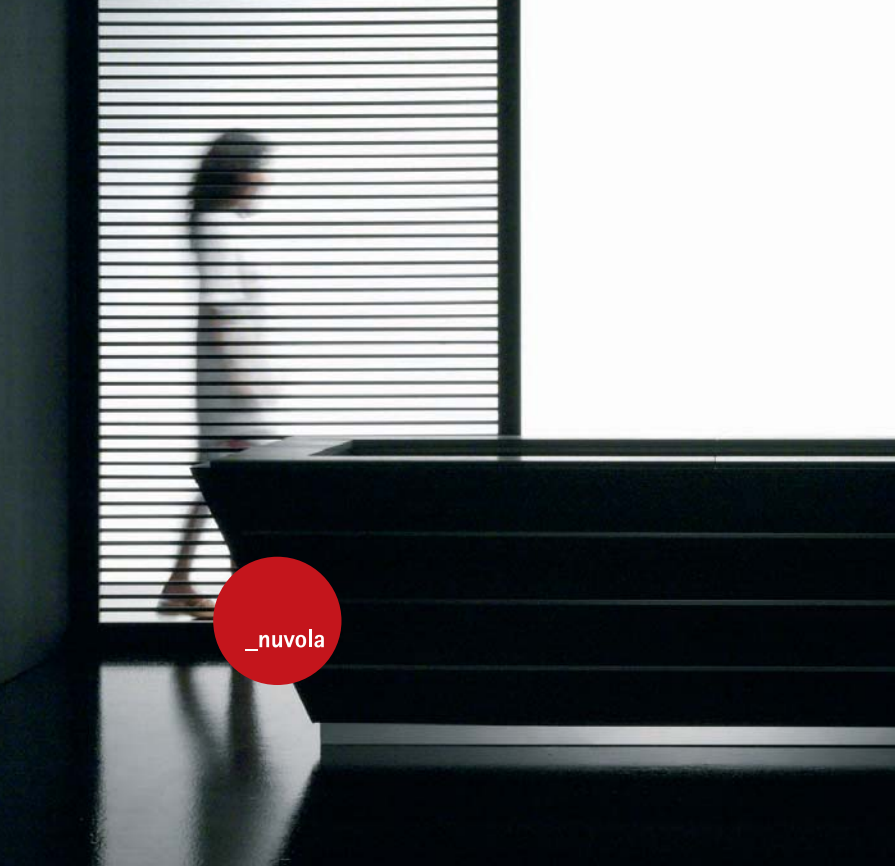
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Letters

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

Research, not a tie-up with healthcare, is the answer

Dr Zeki Karagulle, professor,
Department of Medical Ecology and
Hydroclimatology, Istanbul University

In the last issue of *Spa Business*, a feature suggested that a tie up with healthcare could be the spa industry's reward for being more savvy about scientific research (SB10/3, p20). In central, southern and eastern European countries, balneotherapy and spa therapy – balneotherapy combined with mud therapy, massage, exercise and other treatments – are already part of the conventional medical system and are, at least in part, reimbursed by health insurance systems.

Is a union with spas and healthcare, as it happens Europe, possible for the global spa industry? Maybe. However, I don't think the spas need to build a relationship with the medical sector to become more savvy about scientific research, they simply need their own scientific research.

To do this, the industry needs to co-operate and collaborate with medical and scientific researchers and/or institutions. For example, at Istanbul University we have recently conducted a meta-analysis and assessed all data from randomised controlled trials testing spa therapy and balneotherapy for patients with lower back pain. We found some encouraging evidence suggesting pain reduction. Other



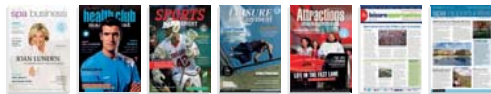
In Europe, balneotherapy (offered at Italy's Terme Merano, above), is part of the national health system

existing research also prove effectiveness in treating rheumatic diseases and psoriasis. Furthermore, many benefits come from massage and exercise therapies. The spa industry should create a database of existing studies to demonstrate that a body of evidence already exists and to confirm the effectiveness treatments.

However, I think the need for more scientific investigation validating spa therapy

is very timely. And I fully agree that the industry should pool resources to support future research. This is an opportune time when patients are seeking alternative, evidence-based methods to heal and improve health. So-called integrative medicine and medical spa practices should be the places where evidence-based spa treatments are being delivered as credibly as mainstream medical practices.

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Vita, an integrative wellness facility (above), successfully combines spa and medical services

Spa and medical services industries can successfully merge

Mindy Terry, president,
Creative Spa Concepts

I read the Scientific Proof feature in *Spa Business* (SB10/3, p20) and wish to share a very successful collaboration between the spa and medical communities.

The experience the Creative Spa Concepts (CSC) team had was with Vita.

Opened in 2009, Vita is a groundbreaking wellness and lifestyle facility from Henry Ford West Bloomfield Hospital in Michigan, US, which combines traditional Western medicine with Eastern therapies, other healing treatments and educational classes. Each programme – focusing on everything from skin and body health to lifestyle and stress management – integrative therapy and class went through a rigorous review by a scientific committee made up of physicians, scientists, nurses, and CSC's team, ensuring each experience to be safe and effective.

Early in our process, CSC reviewed the potential West Bloomfield market. The doctors initially wanted to offer only medical-based treatments. Though, when we

analysed Vita's potential consumer, they matched the average spa-goer. We also discovered a lack of quality local day spas, which led to a great opportunity for Vita to be a key community resource.

When Vita opened, the preventive health services (physical assessments, nutritional counselling, acupuncture) were empty. It was the traditional spa therapies (massage, yoga, facials) that pulled Vita through the first year. Now better educated, Vita's patrons are engaging in the preventive health offerings and programmes.

This proves two major points. Firstly, the consumer should always come first. With integrative wellness centres, it is not 'build it and they will come', we must be very thoughtful about the programmes we create to ensure they will appeal to the mass consumer. And we have to help consumers understand the benefits of being pro-active about health.

Secondly, as spa professionals generally seem to be right-brain dominated and the medical community tends to take a left-brain approach, we must work diligently to create a mutually-respectful marriage. We must learn each other's language, be open to and respectful of each side's methods, and believe in collaboration. Coming together with a blend of both approaches will create a far richer experience that will appeal more people.

Coming together with a blend of approaches will create a far richer experience that will appeal to a greater percentage of people

Saying sorry really does cost nothing

Dr Johannes Abeler, Nottingham
School of Economics, University
of Nottingham, UK

There's a harsh truth for businesses, including spas, everywhere: there's no hiding from disgruntled customers in the internet age. Bad service was once met with either a face-to-face confrontation or a strongly worded letter. Now, however, a grievance has a potentially global audience within seconds.

How complaints are handled has become more important than ever. So it should be comforting for managers to learn that a study has confirmed that saying sorry really does cost nothing.

Our recent research at the Nottingham School of Economics investigated whether customers continue to do business after being offered an apology by a firm that's let them down. Chief among our findings was that people are more than twice as likely to forgive a company that says sorry than one that offers compensation.

We worked with an organisation responsible for 10,000 sales a month on eBay, controlling its reaction to neutral or negative feedback. Some customers were offered an apology in return for withdrawing their comments, while others were offered €2.50 (US\$3.50, £2.20) or €5 (US\$7, £4.40).

Some 45 per cent of participants withdrew their evaluation in light of the apology, while only 23 per cent did so in return for compensation. A higher purchase price further reduced the number of customers willing to forgive for cash, yet it had no effect on the willingness to settle for those magic words: 'I'm sorry.' As customers had no idea they were taking part in an experiment, we can conclude their behaviour was completely natural.

So, although cynics have traditionally dismissed it as cheap talk (which in strict economic terms is precisely what it is), a simple apology really does work. Consumers will always possess the capacity to register a complaint; but, treated properly and with sincerity, they will also retain the capacity to forgive.

news update



The very first Iridium Spa will launch at St Regis Lhasa Resort in Tibet

St Regis' in-house spa brand arrives

A new in-house concept called Iridium Spa is to be introduced within Starwood Hotels and Resorts' St Regis brand.

Speaking exclusively to *Spa Business*, Starwood's director of global spa brands and programming, Mia Kyricos, said: "Iridium Spa is a concept born from the DNA of our brand, originating with the famed Iridium Room [a prestigious ballroom] at The St Regis New York in 1938."

Iridium Spa will fit with guests who are the most discerning of Starwood customers being "generally the wealthiest and the most well-travelled" (see SB10/3 p24).

The first Iridium Spa will debut at The St Regis Lhasa Resort in Tibet at the end of 2010. Facilities will include a signature relaxation area – the Iridium Room – as well as a stunning, gold-tiled swimming pool.

Further St Regis properties in the pipeline for 2011 include one European opening as well as two in China, launching in the fourth quarter. Asia is also a key market for the rollout, followed by EAME.

With the Iridium Spa launch, owners will be able to choose from two spa concepts developed exclusively for St Regis; the other is Bliss World Holdings' Remède Spa.



One of the suites at Raffles Praslin Seychelles

Raffles unveils three new properties

Fairmont Raffles' portfolio is to be further extended with two properties: Raffles Paris – Le Royal Monceau and Raffles Makkah Palace in Saudi Arabia, both of which are due to open before the end of 2010.

The Parisian property is located minutes from the Champs Élysées and will feature interiors by Philippe Starck while the all-suite Makkah Palace is directly adjacent to the Al-Masjid Al-Haram mosque and will offer access to the holiest site in Islam, the Kaaba Al Sharifa. All the suites will offer direct views of Al-Masjid Al-Haram.

Harrington to oversee UK growth of Bliss brand

Seán Harrington, the managing director of Elemis spas and products worldwide, has taken on the responsibility for overseeing the Bliss brand in the UK.

This follows the acquisition of Bliss World Holdings Inc (Bliss) by Steiner Leisure – also the parent company of Elemis – in January 2010 for us\$100m (£71m, £62.3m). The Bliss portfolio consists of the Bliss and Remède spas and product brands.

Harrington joined Elemis, in 1991 and since then has built up a team and infrastructure to deliver the brand across the globe. See p58 for the full story on the Bliss acquisition and rollout.

Abbajay to lead global spa development at Marriott

Sharilyn Abbajay has been appointed vice-president of global spa and retail at Marriott International.

Abbajay, who sits on the executive committee at ISPA, has 30 years' experience in the salon and spa industry and once ran her own consultancy. Prior to Marriott, she was the COO of Neill Corporation – an Aveda distributor – where she oversaw 18 Aveda Lifestyle salons and spas.

Marriott has been operating and developing spas for over 20 years, but Abbajay's appointment signals a renewed interest in the facilities which have become a lifestyle choice for its hotel guests.

Elsewhere, Raffles Praslin will open in the first quarter of 2011. Situated on the second largest island in the Seychelles, it will be located close to the Vallée de Mai nature reserve: a UNESCO World Heritage Site.

The resort will feature 86 villas, each with a private plunge pool. There is also a white sand beach overlooking Curieuse Island.

The Raffles Spa will feature 13 treatment pavilions among natural rock formations high above the water, offering spectacular views. There will also be an outdoor spa garden and pavilion for yoga and pilates.



A total of seven new resorts will open by the end of 2011 including Anantara Uluwatu in Bali

Anantara's extensive global development

Developer and operator Anantara Hotels, Resorts and Spas is to extend its portfolio of luxury resorts and spas across Asia, the Indian Ocean region and the Middle East to include 50 hotels in the next five years.

A total of seven new resorts in China, the Maldives, Oman, Indonesia and the UAE will open by the end of 2011.

They will include Anantara Kihavah Villas in the Maldives. Opening in January 2011, it will boast 78 over-water beach suites and a signature Anantara Spa.

Also featuring the signature spa brand, Anantara Al Madina A'Zarqa Resort in

Oman will be set on a peninsula in the Gulf of Oman and open in March 2011.

The group's first venture into China will be the Anantara Sanya Resort and Spa in south China, which will open in April 2011. Located on Hainan Island, the resort will be flanked by two beaches, Ziaodonghai Bay and Luhuitou Park.

On the south-western tip of Bali, the Anantara Uluwatu resort and spa will open in mid-2011 with 77 suites.

Finally, there is also the Al Barari by Anantara and The Al Yamam by Anantara, both on Sir Bani Yas Island in Abu Dhabi.

Hilton reveals a new global spa concept

Hilton Hotels & Resorts (HH&R) has unveiled a new global spa concept called eforea: spa at Hilton.

The turnkey solution is intended to provide owners and operators with a spa that is both easy to implement and customise.

A notable eforea design element will be a cocoon-like Vichy shower room with signature curved walls. Other features will include integrated music speakers in all treatment rooms, plus an aroma-diffusing system to disperse signature scents.

Another highlight will be custom-design lighting in the spa's Arrival Lounge that brightens as guests walk from treatment rooms.

The global head of the HH&R brand, Dave Horton, commented: "With more than 80 spas in our pipeline, eforea has the potential to evolve the spa segment of our industry on a global scale."



Eforea's Arrival Lounge will boast bespoke lighting

The inaugural eforea has opened at Short Hills, New Jersey, US, with a worldwide rollout to follow in Thailand, Australia, Japan, the Maldives and the UAE.

Elsewhere within the group, Keith Burton has left his role as global vice-president of fitness and spa to become the joint CEO of newly launched budget chain easyGym. His position at Hilton will not be replaced.

GoldenEye gears up for mid-November debut

Nick Simmonds has been appointed managing director of the GoldenEye resort and spa in Jamaica ahead of its mid-November launch. Most recently, Simmonds was the general manager at The Cotton House in Mustique.

When completed, the GoldenEye resort – which was the former home of *James Bond* author Ian Fleming – will include 23 guest units among 52 acres (21 hectares) of coastline, lagoons and tropical gardens.

Within the next year, there will also be a spa offering created at GoldenEye with the design and spa menu based on the two themes of nature and the surrounding environment.

L'Occitane to enter Indian spa market

French brand L'Occitane is to enter the Indian market in partnership with Devi Resorts with three spas in Rajasthan. The Devi Spa by L'Occitane treatments will incorporate ingredients from Rajasthan, combined with L'Occitane formulae. The spas will be located in the Devi Garh Palace in Udaipur, the Devi Ratn Resort in Jaipur and the Rasa Resort, also in Jaipur, which will feature luxury tents with spa pavilions. See p50 for a spa camp focus.



The new facility is located at Lime Wood

The Herb House ready to debut in the New Forest

A 22,000sq ft (2,044sq m) spa called The Herb House opened in early November at Lime Wood in the New Forest, UK.

Product houses include Irish brand Vova and natural skincare brand NUDE. Treatments will also use the Bamford beauty range by Daylesford Organic – the exclusive luxury farming company. This is the first time that Daylesford's organic spa treatments have been offered outside its own wellness facility.

The Herb House spa, which comprises 10 treatment rooms, includes designs by David Collins Studio.



The new, three-floor Palace Spa has been built around a 100-year-old eucalyptus tree

Es Saadi Palace Spa opens in Marrakech

A new spa has opened at the Es Saadi Gardens & Resort in Marrakech, Morocco.

The 32,000sq ft (2,972sq m) spa is spread over three floors and has been built around a 100-year-old eucalyptus tree. It is located within the resort's 20-acre (8-hectare) private garden and is adjacent to its two hotels and 10 luxury villas.

Facilities include 24 treatment rooms, Moroccan and Indian-themed hammams, a relaxation terrace and swimming pools. There is also a couples spa suite with its own Moroccan hammam, twin baths for balneo-therapy, a library and a herbal tea room.

Treatments will be supplied by La Sultane de Saba, Micheline Arcier, Thalises and Phyto and include aromatherapy, facials, hydrotherapy baths and hair treatments.

Also on site will be the world's second Dior Institut, providing anti-ageing care through bespoke skin and body treatments.

In addition is an extensive fitness offering and an organic spa restaurant, called Bio du Bled, serving up a wide range of vegetarian food sourced from the resort's own farm.

The Es Saadi Palace Spa is the second spa to open at the resort, following the Oriental Spa at the Es Saadi Hotel in 2002.

Sankara group and Angsana combine in Africa

The newly-opened US\$37m (€28.8m, £24m) Sankara Nairobi hotel is host to the first Angsana Spa in eastern Africa.

With seven treatment rooms, in addition to two signature rain mist experience rooms, the 5,458sq ft (600sq m) Angsana Spa is located on the hotel's seventh floor.

The spa is the first to open under a partnership formed in 2009 between Angsana's parent company, Banyan Tree, and the Sankara group.

Banyan Tree Holdings has also revealed further details of the next three Angsana properties in the pipeline.

First, by the end of 2010, will be the Angsana Hangzhou. Situated within the integrated Xixi Paradise development in China's Xixi National Wetland Park, Angsana Hangzhou will include an open-air roof garden and a hotel with 59 bedrooms.



The Nairobi facility is the first Angsana in east Africa

Next to launch will be the Angsana Eastern Mangroves hotel and spa in early 2011 in Abu Dhabi, UAE.

Also opening by mid-2011 will be Angsana Balaclava, a boutique resort and spa in Baie aux Tortues (or 'turtle bay') in Mauritius. The all-suite hotel will feature an Angsana Spa with a hammam and hydrotherapy pool.



Coworth Park has many eco elements

Eco-luxury Coworth Park unveiled near Ascot

Luxury hotel operator Dorchester Collection has opened a new country house hotel and eco-luxury spa, Coworth Park, near Ascot in the UK.

Set in 240 acres (97 hectares) of parkland, the 70-bedroom hotel is a restored Georgian manor house and has a host of eco-friendly operating procedures.

The spa will offer treatments featuring Dr Alkaitis products, which are rich in anti-oxidants and healing enzymes and are 100 per cent organic. Kerstin Florian and Aromatherapy Associates lines have also been chosen.

Spatality's Claridges Spa Surajkund opens in India

Spa management company Spatality has opened the Claridges Spa at The Claridges, Surajkund, India. The spa was initially slated to open in May 2009.

Peter Davis, spokesperson for Spatality, said: "Like many projects, this was delayed due to cost cutting measures and construction delays. Originally planned as a complete one phase project, the spa and some of the room inventory were instead slotted into a second phase."

Spatality has been involved with the project since inception via its design consultation, pre-opening and technical services. The firm is now providing ongoing management services for the spa.

New international project manager joins MSpa team

Kathryn Moore has become the new international project manager at MSpa International in Thailand.

Moore will lead spa launches around the world within the four MSpa brands: Mandara Spa, Anantara Spa, Aqualis Spa and the Individually Tailored Spa Collection. She entered the spa industry in 2003, but previously worked in managerial positions for brands such as Hilton and Body Bronze.

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The 27-hectare property will include a significant spa component and is due to open in 2014

US\$5bn Mina Zayed project details unveiled

Further details have been revealed about the mixed-use Mina Zayed Waterfront Development in Abu Dhabi, in the United Arab Emirates (UAE).

With an estimated overall cost of US\$5bn (£3.6bn, £3.2bn), the project will cover a total of 27 hectares (67 acres).

The development will be housed within a hollow, drum-shaped building with a rotating sun screen and will include three branded hotels and residences – MGM Grand, Bellagio and SkyLofts.

There will also be a health and wellness centre costing US\$20m (£14.2m, £12.6m)

and covering 64,400sq ft (5,980sq m). With 41 treatment rooms and suites, the spa will boast the first Bellagio-branded spa suites in the Middle East in addition to a medi-spa component.

Spatiality is currently consulting on its feasibility, design and brand implementation.

Scheduled to open in 2014, the development is located adjacent to Abu Dhabi's new growth areas of Saadiyat Island and Sowwah Island. It is a key component of Plan Abu Dhabi 2030, a governmental blueprint for the urban transformation of the wider Mina Zayed area.

The Palmyra spa on schedule for 2011 launch

The exclusive enclave of Rose Hall in Montego Bay, Jamaica, is to gain a 30,000sq ft (2,787sq m) luxury ESPA spa in early 2011.

Housed in a separate building to The Palmyra resort, the spa is being created in consultation with ESPA and will feature 14 treatment rooms including two private couples suites and nine multi-functional spaces with showers and balconies. Other amenities will include experiential rain showers, a tea lounge and vitality pools with ocean views.

The Palmyra comes under the Solis Resorts & Hotels brand, launched by the former president of The Ritz-Carlton Hotel Company, Horst Schulze, who commented: "In essence, The Palmyra, a Solis Resort & Spa will redefine luxury living and travel in the Caribbean based on input from world travellers and guests."



The wellbeing offering has a considerable water element

The Palmyra is located on 16 oceanfront acres (6 hectares), on the grounds of a former plantation. It will offer 299 bedrooms and 23,000sq ft (2,138sq m) of indoor and outdoor meetings space, including a gazebo that extends into the nearby bay. Guests also have access to three golf courses: the White Witch Golf Course, Cinnamon Hill Golf Course and the Half Moon Golf Club.

Work to begin on thermal spa project in Buxton, UK

A legal agreement has been signed to allow work to start on the £32m (US\$49.4m, €38.9m) development of The Crescent building – which is to be transformed into a luxury hotel and thermal spa – in the UK spa town of Buxton.

The agreement – between landowners High Peak Borough Council and Derbyshire County Council – is supported by Nestlé Waters, which bottles the local mineral water under the Buxton brand. It protects Nestlé's right to draw underground mineral water.

It is expected that redevelopment by the Buxton Crescent Hotel and Thermal Spa Company could begin in late 2010.

Akasha Wellbeing Retreat for Jerusalem

A 10,764sq ft (1,000sq m) spa designed by the Milan-based interior architect Piero Lissoni has opened at the Mamilla Hotel in Jerusalem, Israel. Called the Akasha Wellbeing Retreat and Spa and located less than a mile from Jerusalem's Old City walls, the facility has been created as a core component of the hotel's experience. The spa's design incorporates feng shui principles to create a warm and relaxed atmosphere.



Treatments include a creekside massage

L'Auberge de Sedona revamp is completed

The final phase of a US\$25m (£19.2m, €16m) refit at L'Auberge de Sedona resort in Arizona, US, has ended. The central focus of the revamp and expansion was a programme called Project Elevation, which aimed to boost the resort's facilities while remaining environmentally sensitive. As part of this, a new Serenite Spa with seven treatment rooms was constructed as well as 11 new spa cottages, complete with outdoor showers, to form a new spa village. Managed by Destination Hotels and Resorts, the spa was designed by Cary Collier of Blu Spas.



Flagship site The Sanctuary in London's Covent Garden, UK, opened more than 30 years ago

PZ Cussons CEO to join two key brands

Following the acquisition of St Tropez by PZ Cussons from private equity group LDC for £62.5m (US\$99.4m, €71.4m), the group's chief executive has outlined international growth plans for the product range.

Chief executive of PZ Cussons, Alex Kanellis, said: "The acquisition represents an excellent strategic opportunity and further strengthens our portfolio of 'masstige' brands which includes The Sanctuary.

"We see good growth opportunities, both in the UK and overseas, particularly by linking the strategy to that of The Sanctuary spa brand."

Michelle Feeny, St Tropez's chief executive, added: "PZ Cussons offers a synergistic opportunity for growth, particularly in conjunction with The Sanctuary, and will add the scalability that the brand needs to become a truly international player."

As of the year ending 31 July 2010, St Tropez reported gross assets of £48.1m (US\$76.5m, €54.9m,) with revenue at £20.7m (US\$32.9m, €23.6m).

More than 80 per cent of St Tropez's sales are said to be within the UK, while the US and Australia have been outlined as growth markets for the brand.

Inaugural European Holmes Place Spa opens

The first branded Holmes Place Spa has opened in Europe within the Zürich Holmes Place Club

Designed by Heinz Schletterer of the Schletterer International Group, the spa took five years to build and cost US\$2.7m (€2m, £1.76m). The interiors feature accents of cool stonework and wood to create a tranquil atmosphere.

Spa manager Charlotte Taylor explains: "We wanted the spa to inspire people to find a balance with the stress of everyday life. It's an ideal addition for members of the fitness club."

A wide range of treatments from exclusive spa partner Elemis are offered while facilities also include a sauna, steambaths, a whirlpool and relaxation areas. In addition is a silent relaxation room with four water beds, a drinks lounge, a VIP spa suite, a herbal bath and a scented mist walk.



The Holmes Place Spa was designed by Heinz Schletterer

Work has already begun on the next spa to open within a Holmes Place Club, which will be a Spa Club located in Berlin, Germany at Potsdamer Platz.

Holmes Place health clubs were founded in 1980 to complement sport programming with health coaching and holistic wellbeing. The company has 200,000 members at 49 locations with around 4,000 staff.

DIARY DATES

9-10 December 2010

International Luxury Spa Summit

Cannes, France

Primarily aimed at international hospitality professionals, this event has been designed to provide bespoke solutions for spa projects, as well as help owners to reposition existing facilities. There are also short, one-to-one sessions with investors available.

T: +33 4 93 78 65 92

www.internationalluxuryspasummit.com

30-31 January 2011

Hair & Beauty

Messe Frankfurt Exhibition space, Frankfurt, Germany

This event will include workshops from experts as well as stage shows, best-practice examples and interviews.

There will also be a Professionals@ Business Corner lecture programme (in German) specifically for salon owners and managers.

T: +49 69 75 750

www.messefrankfurt.com

9-12 February 2011

Kosmetik Expo

Moskott Moscow Royal Aurora, Russia

The 2011 Kosmetik Expo event is primarily intended for beauty industry professionals with the expo part of the event attracting around 250 Russian and global companies.

T: +7 495 937 1318

www.ki-expo.ru

21-23 February 2011

IYABA

Accra International Conference

Centre, Accra, Ghana, West Africa
Featuring a range of exhibitors from across Africa as well as educational aids for the salon and spa industry, this expo will also include nail and barbering competitions as well as a business management seminar.

T: +233 21 765 604

<http://iyabaexpo.com>

27-28 February 2011

Professional Beauty 2011

ExCeL, London, UK

With the recent acquisition of Professional Beauty by Total Beauty, the two events will be combined and take place at London's ExCeL. The event will include the one-day European Spa Convention on the 27 February.

T: +44 20 7351 0536

www.totalbeautyshow.com

Christopher Norton

It's an exciting time for the chair of Four Seasons' global spa task force – the chain has 50 new hotels, all with spas, set to open in the next five years. But how do you guide the development of so many spas around the world? The hotelier turned spa expert tells all



Although Norton would describe his original calling as a hotelier, he is deeply passionate about spa operations and development

Though he chairs the spa development task force for Four Seasons, Christopher Norton still fancies himself as more of a hotel man. “Originally, my calling and career is as a hotelier,” he says. “I work with lots of people who technically are great spa experts, some who have spent their whole lives studying the discipline. Some are brilliant and are better technicians than I will ever be.”

But talk to Norton about spas, and you can hear his passion. Ask him for his favourite spa, and he'll give four different answers (see p24). Ask him about his favourite treatment, and he'll name two. He speaks of past Four Seasons projects like a proud father, and excitedly tells the story of the best spa experience he ever had: a tantric ayurvedic massage at the Four Seasons Resort Maldives at Landaa Giraavaru, a spa he helped create. “They're more rituals than they are massages. There's a very talented senior spa director there, and it was a fantastic experience – it's the only time that I've literally had a conscious out-of-body experience, and it's happened to me twice at that spa.” A post-elephant ride herbal poultice treatment in the peaceful jungle surroundings of the spa at Four Seasons Tented Camp Golden Triangle, Thailand, he quickly adds, is a close second.

Spa development makes up only a small part of Norton's duties – based in Paris, he's regional vice-president overseeing the Four Seasons Hotel George V Paris, the Four Seasons Resort Provence, the Four Seasons Hotel Doha in Qatar and the Four Seasons Riyadh in Saudi Arabia; he's also the George V's general manager. Norton estimates he only spends about an hour a day on spa task force duty. But the role is still a major responsibility – established in 1960 and now with 83 properties (nearly all with spas) around the world, Four Seasons is a major brand – and the chain has 50 more hotels set to open in the next five years, all with spas. Though Norton won't be closely involved with each new spa personally, he's overseeing the direction of spas for the chain at an important time.

A HOTELIER BY CALLING

Fifty-two-year-old Norton – who was born in the US and raised in Switzerland – first became interested in hotels at age 14, through a friend with a hotelier father; he sought out an apprenticeship at Hôtel Baur au Lac in Switzerland, and began his career in the US at hotels in Atlanta, Boca Raton and New York. It was at the Watergate Hotel in Washington DC in the mid-1980s that Norton was exposed to his first spa development. “It was one of those older set-ups where you had a swim club and some gymnastics and one or two little rooms in the back where a big hairy man would massage people after the workout,” he says. “We took that apart and renovated,



Norton's first major spa project was at Four Seasons Bali (above); one of his favourite treatments was in Thailand (opposite)

gave it a whole new look and feel and did things that back then weren't commonplace."

In 1989, Norton got his start with Four Seasons after he was offered a role at Le Quatre Saisons Montréal. "I was in charge of hotel operations, and the spa was part of it. Since I'd tasted it a bit in Washington, I immediately took to it," he remembers. "The spa as a business component and what it can do for a hotel environment has always fascinated me."

When Norton moved to the Four Seasons Resort Bali at Jimbaran Bay as general manager, he became involved with his first major spa project. "We decided to tear down the original spa and I worked with a pretty interesting spa team including an architect [Grounds Kent], spa consultant [Blu Spas Inc], interior designer [Hinke Zieck] and landscaper [Made Wijaya]," he says. "It was an incredible operation, an amazing experience." The spa opened in 1997; it's since been named one of the top spas in the world by *Condé Nast* and *Travel + Leisure*, Norton adds proudly. The following year, Norton helped open a second spa at the Four Seasons Resort Bali at Sayan, reinventing an indigenous Balinese spa in more contemporary terms.



Norton worked for many years in Asia with Neil Jacobs, a regional vice-president for south-east Asia out of Singapore (see SB05/2 p18). Jacobs was also the first chair of spa development for Four Seasons and when he moved to the Starwood Capital Group in 2008, Norton inherited the position of spa task force chair. "I'd been in Asia for a long time, I worked in the US for 20 years, and I grew up in Europe, so I brought a global perspective to the role. We'd built a ▶

INTERVIEW

Each Four Seasons spa is the product of the group's spa task force. This was created in 2003 and today includes 30 staff of various levels globally

- lot of fantastic spas in Asia, and had done a lot of trendsetting things. So the role stuck with me even after I moved to Paris."

GOING GLOBAL

Four Seasons originally created its spa task force in 2003, involving staff of various levels globally from grass roots rather than creating a spa division at its Toronto headquarters. There are now 30 people on the task force and, since taking over as chair, Norton has created a regional structure to keep up with the growth in properties, appointing four regional vice-presidents or general managers to oversee spa development in the Americas (Thomas Steinhauer), Europe (Rene Beauchamp), the Middle East (Simon Casson) and Asia (John O'Sullivan).

"Instead of making it Asia-centric and saying the spa guru has to sit in Asia, the spa task force has become more global," he says. The regional spa leaders work closely with senior spa directors, who are more hands-on advisors in the new developments. "Our senior spa director for Europe will oversee our spa in Paris, but also has great influence on the other spas. She doesn't run them – they have their own spa directors – but she becomes an advisor and a very important resource to the other spa directors," Norton says. "Most of our technical experience lies at the level of senior spa director."

Members of the task force – not always Norton personally – can get involved in a spa development as early as discussions with ownership in Toronto about a potential project; it depends on the project and its needs. Task force members will discuss concepts with the Toronto-based development and design specialists and provide input on architectural plans, interiors, choice of consultants, technical and operational plans. The senior spa directors, many of whom have formal training in architecture and design, provide especially valuable input at this stage. Norton and his task force colleagues also help to find spa director candidates from within the company to run a new spa, assign certain spa directors to provide pre-opening assistance, and develop and run training programmes to help staff on their career tracks. "I think we probably have the best spa management training programme that exists today," Norton says.

Four Seasons spas are extremely diverse – not only are they located around the world, but the company makes a point of aiming to provide an indigenous experience for guests. So how is brand consistency maintained? Through a high level of service, Norton says. "In a spa, it's not only the 55 or 80 minutes you're on the massage



Norton says spas can make an incredible impact on people's wellbeing and that guest feedback can be very powerful

table, there's an entire pre- and post- sequence that's key, and we're very good in planning and executing the entire experience, right from when you walk in: how you're greeted, how it looks and smells, and how you feel going into the treatments."

Another factor separating Four Seasons spas is the emphasis on products, Norton says: his team has evolved to be pickier about what products go into a spa (there is no one main product house across the group), as well as aiming to offer a variety of lines in each location. To please guests, they've followed trends to include more natural products especially those from Sodashi and The Organic Pharmacy, and are also evolving more sophisticated high-tech brands with L. Raphael, Sodashi and Vaishaly. The company also encourages exclusive agreements with suppliers. "When you come into one of our spas, ideally you'll find products that you can find nowhere else. If you come to our Paris spa, you'll find two out of three of the main product lines are exclusive to our French spas. And you sense you'll get a treatment that you can't find anywhere else."

The indigenous component the company encourages in terms of spa architecture and design extends to product lines, Norton says ►

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INTERVIEW

PERSONAL FILE:

Christopher Norton

Favourite Four Seasons spa: Jimbaran

Bay – I gave birth to it, it's important to me – and the Hong Kong city spa

Favourite non-Four Seasons spa: the one at the Dolder Grand Hotel, Zürich

Favourite treatment: a really, really good Balinese massage. And a massage treatment we've developed that's on our menu in Paris, Tropical Magnolia

What do you do in your free time? What free time? If I have any, I love spending it with family and a few very close friends

Favourite book: *Conversations with God*, by Donald Walsch

Favourite film: *The Great Escape*

Favourite food: grilled fish

Favourite place: wherever I am

Who do you admire most in life? People who have the ability to stay young in their mind, people who keep growing and learning, and who keep their minds open

What's the best piece of advice you've ever been given? Never take yourself or others too seriously, but take your work seriously, and live every day like it's going to be the last



- - it's a policy not to impose products globally, and spas have lots of autonomy in choosing products. "It's important," he says. "If you walk into a spa in Bali, you don't want to find a typical French cosmetic brand on the shelves. You want to find something made by a little old lady up in the mountains that has incredible healing power and is rare and special." Creating exclusive partnerships isn't hard – providing their product to high-end spas with guaranteed customers give suppliers a great benefit, Norton says, and his team spends a great deal of time on merchandising.

DIVERSE DEVELOPMENT

As the company's spas vary greatly, so does the spa development process, with expenses, consultants and timelines differing depending on the project and location; occupancy and capture rates vary too greatly to give one average, Norton admits. "In a good city spa, we'd look at treatment room occupancy rates of about 60 per cent," he says. "At a city hotel we do about 16 to 20 per cent capture rate, but you can have 30 to 50 per cent outside guests. In resorts, sometimes you look at capture rates between 35 and 55 per cent, because if you go to Bali you've got to have a massage."

"You have to look at various measures at the same time. Instead of looking only at how much we capture, we look at the quality of what we do, and we look at the revenue per available treatment room. The quality part is as important as the quantity."

His team looks at a variety of other KPIs including total spa revenue per occupied hotel room, RevPATH and spa retail revenue as a percentage of total spa revenue. The spa task force has also put together a specific yield management protocol. "You should be sure to mix the occupancy of treatment rooms with the average price of your treatments and what you provide, whether you book one or two hour sessions and how you make the most of your square footage."

Places like Florence – which had no luxury hotel or spa until Four Seasons launched (above) – are important for future growth

The task force has no influence over where Four Seasons is headed next – headquarters decides on new development locations – but Norton has lots of thoughts on what areas have spa potential. Asia is still an important region for growth, he says, but somewhere like Florence – which had no luxury hotel or spa until Four Seasons opened there in 2008 (see SB10/3 p64) – is just as important for the company, he says. "You can have some incredible experiences in Europe," he says. "Some of the Middle Eastern spas are going to be fascinating – we're embarking on a ladies-only spa in Riyadh, Saudi Arabia, which is going to be incredible, and we have an amazing spa in Doha, which would rival most facilities worldwide. And there are some beautiful spas in the US." Four Seasons is currently under-represented in South America, and there's also interest in going into Russia, he notes. "There has to be a global consciousness to make sure [what we offer is] quality, indigenous and exciting."

Wherever Four Seasons takes its spas, it's an exciting time for Norton: "The company is excited to take the spa seriously as we grow, and to make sure there's a culture where we keep rising above the rest in terms of passion, quality of products, service, and results," he says. "Spas make an incredible impact on people's wellbeing, and, when you do it well, the feedback from your guests is very powerful and immediate and there's great satisfaction to that." ●

are you
the next?

Arabella Sheraton Hotel***** Munich, Germany

Le Meridien***** Stuttgart, Germany

Steigenberger Hotel Sonnenhof***** Bad Wörishofen, Germany

The Ritz Hotel***** Paris, France

The Dolder Grand***** Zurich, Switzerland

Grand Hotel Kempinski***** Strba-Strbské Pleso, Slovakia

Jumeirah Zabeel Saray, Palm Island***** Dubai, UAE

The Ritz Carlton***** Istanbul, Turkey

Hotel Hout Bay Manor***** Cape Town, South Africa

Hotel Arlberg***** Lech am Arlberg, Austria

Crowne Plaza***** Kuwait City, Kuwait

Hotel Union***** Geiranger, Norway

Hotel Prezydent***** Krynica-Zdrój, Poland

Vidago Palace***** Portugal

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Everyone's talking about...

The Indian spa market



Geo Spa Fitness, which worked on the spa at Leela Kempinski Delhi, says hotels are leading spa development in India

AS INDIA'S EMERGING SPA INDUSTRY FINDS ITS FEET, WE ASK SOME LEADING EXPERTS AND INDUSTRY PLAYERS TO DELIVER A SWOT ANALYSIS

From the breathtaking Himalayas and the beaches of Kerala to the bustle of Mumbai, India is full of spectacular natural beauty and world-class tourist attractions. Coupled with an ancient tradition of healing practices, and you've got a very tempting spa destination.

And now may be the time to enter the market. One of the BRIC economies predicted to be most dominant by 2050, India is seeing a lot of growth and one of the most promising areas for spa operators to target could be its burgeoning middle classes. While India's middle class currently comprises less than 30 per cent of its 1.2 billion population, its consumption is forecast to treble as a share of India's total consumption over the next 15 years, according to a recent Deutsche Bank Research report. India is also growing rapidly as a tourist destination; 5.37 million foreign

tourists visited the country in 2008 – up 57 per cent from 1996.

Though healing is ingrained in Indian culture, the modern spa and wellness sector is still emerging and open to new brands and ideas. While hundreds of low-end beauty salons and massage facilities across the country label themselves spas, most world class spa development has taken place only over the last five to eight years, and has been mainly limited to hotels. But the market is expanding rapidly – an April 2010 report by global knowledge services firm Netscribes values India's wellness services market at INR110bn (US\$2.5bn, €1.8bn, £1.6bn), growing at a rate of 33 per cent annually.

Medical spas present a particularly strong opportunity for all investors. A report by market research firm RNCOS predicts that India's share in the global medical tourism

industry will climb to 2.4 per cent by the end of 2012, and medical tourism is expected to generate US\$2.4bn (€1.7bn, £1.5bn) for the country by then, growing at a compound annual growth rate of 27 per cent between 2009 and 2012. Medical tourist numbers are expected to grow at 19 per cent annually, reaching a total of 1.1 million by 2012.

Challenges to entering India include poor infrastructure, bureaucratic red tape and a shortage of international-standard therapists. But infrastructure is slowly improving, and government-accredited training institutes are in the pipeline as well as new initiatives to ease development. Notably, a government panel recently recommended that India open its equity markets to foreign retail investors.

So what does the future hold? We ask some leading experts about India's strengths, weaknesses, opportunities and threats.

India already allows foreign-owned brokers to trade directly on the country's exchanges.

Now, a panel set up by the government has recommended the Finance Ministry make it easier for foreign retail investors and, in particular, affluent Indian expatriates, to buy shares on Indian exchanges. Foreign investors will benefit as they get to directly participate in India's growth.

The main impediments to foreign investment are a cumbersome political system that slows the pace of reform, and the poor state of the country's infrastructure. Progress has



MANOJ VOHRA

Director of research, India Economist Intelligence Unit

already been made in some areas (notably telecoms, roads and ports), but the huge amount of investment still required means infrastructure will be poor for many years.

However, rising income levels mean this population of almost 1.2bn is becoming an increasingly important market. In addition, India remains an increasingly attractive destination. The enormous gap between limited hotel room supply and high demand implies strong potential returns on investments, and

a large number of Indian and foreign companies are building new hotels across the country. Three hundred hotel projects have been approved by the government and are in varying stages of development, according to India's Ministry of Tourism.

Still, capacity constraints are unlikely to be eased in the short term, as demand is expected to continue to exceed supply. Furthermore, nearly half of the new hotel projects are luxury, suggesting the current situation of high prices and low availability of accommodation will continue.

The opportunity exists at both ends: budget and luxury. However, developers should identify investment locations carefully, as the extent of the opportunity for each will vary from state to state.

A panel recently set up by the government has recommended that the Finance Ministry should make it easier for foreign retail investors to buy shares on India's exchanges

We're not a strong operator in India at the moment, but

we have 15 properties opening between 2011 and 2014, 13 of which will have spas. From our perspective, India is a market with high barriers to entry. Entering it can be challenging, but recently there have been changes from a development perspective. Governmental reforms have eased height restrictions, allowing for larger properties and more room for facilities like spas.

It's an exciting market, and we've got a blend of development projects, from urban and resort to a very holistic retreat-style. We



VANESSA MAIN

Director, spa operations & development, Asia Pacific, Hilton Worldwide

don't find that in every market – here we've got the flexibility to look at different models. With its natural beauty and spirituality, India provides a perfect environment for holistic modalities and retreats.

The people of India have a strong affinity with spa services and spiritual healing traditions. However, we're now also starting to see a demand for more sophisticated spa experiences, and people are beginning to embrace high performance-style treatments



India, unlike many markets, lends itself to urban, resort and holistic retreat spa models

and skincare. There's more brand awareness coming into the market, and it's starting to become a very competitive landscape as well.

Hilton isn't big in India yet, but it does have 15 hotels – and 13 spas (above) – in development

Cultural sensitivities also have to be taken into consideration when developing Indian spas. It's not just providing segregated areas for men and women – it's about being sensitive to their culture. You need to be able to execute ayurveda with full integrity; you can't take it halfway, because in certain areas that might offend.

India is definitely a long-term market for us. We're consistently adding projects to our development pipeline, and I wouldn't be surprised if in five years time we're operating more than 20 spas in India. We're really looking forward to the upcoming challenges. ►



There are seven major Indian spa training institutes including ASI (above)

JANE CREBBIN-BAILEY

Partner, HCB Associates

India's spa industry is committed to ensuring guests receive the highest quality, authentic spa experiences. But, currently, the lack of professionally-certified staff is a challenge; spas are left to poach good therapists, and employ unqualified staff who may be good masseurs, but lack formal training and knowledge of anatomy, physiology and best hygiene practice.

India will require 20,000 new spa therapists by 2012; it's an ambitious number. But a lot of new training institutes are opening. Many offer short beauty courses and claim they're a spa training school, but there are currently seven major spa training institutes offering certifications around the country—including the first institute designed and built for spa training in India, the Ananda Spa Institute (ASI), owned by renowned brand Ananda (see SB08/3 p36).

Spas and ayurveda go hand in hand, so a lot of the ayurvedic schools, mostly origi-



nating from Kerala, are now turning into spa schools, or adding courses in services or Oriental therapies. Interestingly, the recently-opened Oriental Spa Academy, owned by India's Cambay Resort, has linked up with the Lanna Thai Spa Academy in Bangkok: it's important to

offer students a global perspective. At ASI, [which I consulted on] we're trying to promote longer courses [typically nine months to three years] but offer short courses as well [typically two weeks to six months] to attract people.

To encourage national students, ASI and many other institutes offer a two-tier price system – one for international students, and one for nationals with reduced fees. There are also programmes set up by hotel groups to recruit and provide accommodation and training for those in poorer communities. It's important for India not to rely on recruiting from overseas but rather develop its own talent or encourage those working overseas to return with their international expertise.

By 2012, India will require 20,000 new spa therapists and that's an ambitious number... however, it's important for India to develop its own talent rather than rely on recruiting from overseas

Knowledge of day spas has increased recently among the people of India; this market is blossoming due to a burgeoning middle class with incredible disposable income, and there are opportunities for operators to tap in. Though recent economic pressures have affected the country, the desire to enjoy experiential treatments does encourage locals to experiment with locations in their vicinity.

Bangalore was probably the first city to see day spa development geared towards attracting a domestic audience, with Aroma Garden, a day spa founded in 2000. It was a pioneer in introducing western-style treatments in a day spa setting to India. Spas



CARINA CHATLANI

Chief executive, Spa and Wellness Association of India

located at hill stations (hilltop towns popular with vacationers) are also attracting locals.

These spas are generally geared towards western-type treatments with some influence from ayurveda, though it's challenging to honour the authenticity of ayurveda in a day spa format.

Other existing regions with potential for developers include Delhi and Mumbai, with their vast numbers of tourists and residents; Kerala, known for its traditional ayurvedic therapies; the northern Himalayan region, which draws locals and foreigners and Goa, a highly-visited state with numerous wildlife

sanctuaries and protected, government-run forests, which make it an easy choice for development of ayurvedic and resort spas.

Emerging tier III cities – a collection of about 30 small, booming cities located near major Indian metropolises – show the most promise for spa development, as saturation in tier I and rising property prices in tier II cities are driving investors away. One of these, Nashik, located in a burgeoning wine region, offers tremendous potential for resort development, with its spiritual heritage and location near the Godavari River.

There's great potential to utilise India's own natural creations – yoga, ayurveda, vastu, pranayama – in spa concepts.

And while the world has seen these creations originating from the indigenous healers, Indians feel compelled to explore as well as ensure their own traditional phenomena are honoured.

Tier III cities – small, booming cities near major metropolises – show the most promise for spa development, as saturation in tier I and rising property prices in tier II cities drive investors away

As a medical tourism market, India has the most potential of any country. And since India is the home of ayurveda, opportunities for its use in medical tourism are immense. India has 220 colleges teaching ayurveda, and one university entirely devoted to it. Facilities in India offer ayurveda packages from four days to four weeks; these attract international tourists, and some have waiting periods of more than 12 months. In larger Indian cities, up to 30 per cent of local people already seek ayurvedic treatment, and in rural areas the percentage is almost 97 per cent.

Lack of standardisation is the biggest challenge. The Department of Ayurveda, Yoga and Naturopathy, Unani, Siddha and



DR SARAT YENIGALLA

Director, LeoJuventa Centre for Integrated Medicine

Homoeopathy (AYUSH), an initiative by India's Ministry of Health, is doing pioneering work in bringing standardisation to institutes, universities and hospitals teaching and practising these ancient medicine systems. The organisation has formalised an accreditation programme, clearly differentiating a wellness spa and a medical spa.

At the LeoJuventa Centre for Integrated Medicine, we practise ancient Indian traditions along with cosmetic dentistry, weight management, diabetes management, physiotherapy and rehab, performance diagnostics and sports injuries rehab. We currently get a healthy mix of local, national and inter-

national visitors and patients, including corporate groups visiting for pampering packages and medical tourists.

We've already opened a successful integrated facility in Hyderabad and are now looking to tap into opportunities elsewhere in India. We've decided to expand to the eastern coast near Visakhapatnam, the western coast near Mumbai, the Western Ghats near Panchgani, and the north near Rishikesh in the Himalayas. The government's strong initiatives will lead to stupendous growth of the wellness sector – promotion of the ancient systems through the Ministry of Tourism and its offices around the world is already boosting the sector.

In the early 1990s, all eyes were fixed on India's external trade policies – duties were as high as 250 per cent on imported luxury items. The relaxation that has taken place since has spurred India on its path to becoming an economic superpower, and created an environment that's finally truly ripe for world class development in the wellness sector.

Over the past two decades, India's hospitality sector has experienced unprecedented growth. It encouraged new brands and ideas, and pushed for international standards in architecture, interiors and service; it's now a very exciting time to invest in this sec-



NIQI KUNDHI

Group CEO,
GEO Spa Fitness

tor. So far, India's hotels have led the way in spa development, as hospitality leads India's social structure – whatever the hotels do has a torrent effect on the aspirations of the Indian consumer, making these hotel spas appeal to domestic as well as foreign consumers.

The spa zone, once thought of as an out of sight basement activity, is now considered vital for hotel developers in India and takes prime position by the poolside, with easy access from the guest bedrooms.



PHOTO: THE SPA AT LEO JUVENTA CENTRE

Spas are now vital for hotel developers

Beyond the hospitality sector, spa developers in India are creating destination, urban, day and medi spas, and this development is set to continue. Young, ambitious Indian doctors who can lend their expertise to medi-spas are also a particular strength.

I predict that India will see a fine-tuning of franchise, hospitality and spa brands in the future – the country is positioning itself to be a brand creator, not a brand adopter.

So far, India's hotels have led the way in spa development as hospitality leads India's social structure – whatever the hotels do has a torrent effect on the aspirations of the Indian consumer

India's hospitality sector is doing very well. By 2013, there will be an enormous supply of hotels, with at least 20 companies in play. There will be lots of competition in the market, and India will become a very competitive destination in terms of attracting tourists.

We've been wanting the government to put a national tourism advisory board in place which will allow new project holders to get clearance for their developments quickly. Foreign players haven't been able to come into India because of red tape, and once



RAJINDERA KUMAR

President, Federation of Hotel & Restaurant Associations of India

that's streamlined, it should encourage more investors.

What's required today is to come up with something for the mid-market segment, which is totally missing from the scene. The government is providing incentives to encourage this part of the sector. There's a lot of focus on the mid-market segment at the moment – I think that even chains could profit from targeting the mid-market, as there's a need to provide

a value-for-money option and to balance out all the luxury five-star offerings.

India's biggest strengths are its beautiful locations and its [kind hearted] people – there is much potential for hospitality and tourism across the country. There are big cities and beautiful tourist attractions providing a strong pull for visitors and we're trying to develop our infrastructure and facilities. Once all these are in play, we'll be complete in all respects as a world-class tourist destination.



Sabrina and Jesper Hougaard

the HOUGAARDS

Ten years ago, Jesper Hougaard and his wife Sabrina chose India as the inspiration for their spa concept, Serena Spas. Having enjoyed great success, their next step is to persuade and help the Indian government set spa training standards

Jesper Hougaard is Danish. He's also very funny. Ask him how he ended up marrying his wife Sabrina, and he says that, having first hired her to set up the recruitment of staff for his spas, "it soon became more economical to marry her than to pay her a salary!"

Serena Spas was established by Jesper in 2000 as a turnkey solution for resort owners who either didn't know anything about running a spa or wanted an independent operator to do it for them.

Previously managing director of Maldivian Air Taxi, one of the world's largest sea plane airlines, Hougaard had been based

in Malé, the capital, since 1994. On a small island where everyone knows everyone else, he had built himself a robust reputation as a successful businessman.

In 2000, the airline invested money in a resort and luxury spa on Malé, and Hougaard became involved in its management. He says he immediately saw the rewards of working in the spa market. "There's no industry where you get closer to your guests and get immediate feedback about whether what you're doing for them is good or bad."

AN INDIAN LOVE AFFAIR

At the time, Hougaard's two children from his first marriage were in boarding school

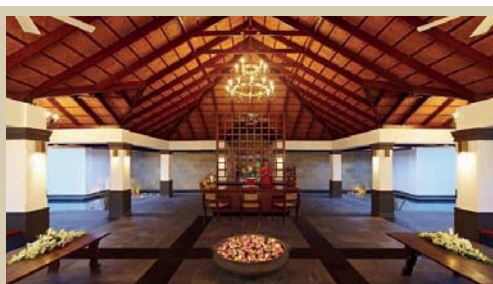


in India. During his frequent travels to visit them, Jesper became interested in ayurveda and he says this was the catalyst for developing his own resort spa concept.

With perfect Nordic confidence, Jesper claims that "although Thai and Balinese spa concepts are wonderful, they belong to Thailand and Bali and they don't belong anywhere else." He wanted something to suit the location, heritage and native ingredients of India, the Maldives and Sri Lanka, which is why he homed in on Indian wellness.

"Serena Spa is more about pampering than ayurveda, which is not really a spa concept," says Jesper. "It's a curative and hospital concept and is not really suited to week-long tourism. We do not pretend to cure anything, we're just for relaxation."

In 2000, Hougaard gave up his job at the airline, and won a contract to own and operate his first Serena Spa in Thudufushi, a Maldivian resort. What he designed became the template for all Serena Spas – it included antique wooden Indian furniture and treatment products made in India using native ingredients. The spa menu was a mixture of ayurvedic massages and traditional Indian and Maldivian body and facial therapies.



Since opening in 2003, the Serena Spa Institute in Mangalore, India, has trained more than 500 students, who are all guaranteed a job at one of the facilities within the Serena Spa portfolio on completion of their studies



Only two years later, he had developed and was operating nine resort-based spas under the Serena Spa brand – seven in the Maldives and two in Sri Lanka.

During a visit to a potential new property in Kerala, India, Hougaard met Sabrina. She was a guest at the resort and he discovered her background was in human resources and training. Sabrina recalls: “Jesper asked me to put together a course for his therapists that would include specific technical treatment training. He also invited me to the Maldives to see the way the spas were run.”

Eighteen months later, Hougaard asked Sabrina to marry him and she agreed, on one condition. “I didn’t want to leave the place I was born because I wanted to look after my elderly parents. I told him I couldn’t marry him unless he moved to Mangalore.” Today, their head office and training institute is still based in the 101-year-old house her father was born in.

A CREDIBLE CAREER

Professionally, Sabrina complemented Hougaard well. While his role was – and still is – negotiating new contracts and looking after the finances, hers was to find staff and provide

them with training. Recruitment was a particular challenge she says: “Because Jesper was offering an authentic Indian experience, he didn’t want Thai or Balinese therapists, he wanted Indian ones.” However, finding spa therapists in India is a struggle.

“The spa industry still has a huge stigma in India,” says Sabrina. “Typically, a therapist is a rural girl who has come into urban India. Many of them lie to their parents about their job because their families assume it is not an honourable profession.”

To overcome this, the Hougaards set up their own training centre in Mangalore, to offer students a credible career. The Serena Spa Institute offers training courses of three to six months duration, with a guaranteed job in one of Serena Spas at the end. Since its opening in 2003, the academy has trained over 500 students.

Sabrina does a lot of the training herself – creating a career for her therapists is her passion and she loves learning new spa modalities. Alongside her, the institute employs up to four teachers, as well as doctors and physiotherapists to teach subjects such as anatomy, dermatology, hydrotherapy and guest relations in order to obtain their

“The spa industry still has a huge stigma in India. Many therapists lie to their parents about their jobs as their families assume it is not an honorable profession”

certificate in spa therapy. Then, students are trained in specific treatments and massages offered at Serena Spas.

A warm, motherly figure, Sabrina admits her role is not just as director of operations. More often than not, she says she plays the role of confidante and regularly helps out any of the 135 staff members having relationship or family troubles.

THE PERFECT PARTNERSHIP

Hougaard says his time is taken up looking after the company’s relationships with resort partners. There are now 14 spas under the Serena Spa umbrella (see p32) and each partnership works the same way, based on a basic revenue sharing model. “We get a ▶

percentage of all spa revenue," explains Hougaard. "The employees of each spa are ours, we pay their salaries and their insurance. They provide the space and the laundry but otherwise it's our baby. The resort takes the remaining profit and benefits from getting a turnkey spa operation, without any hassle. Plus it means they can up their star rating and the price of their rooms."

When looking for a new resort partner, Hougaard stresses the importance of the resort being high-end (typically five-star) and having the right price range because, "you obviously can't have a spa treatment costing more than a room for a night".

Most importantly, however, the resort must be eco-friendly as Serena Spas is mindful of its impact on the environment – it uses organic products and has many other green initiatives.

When Hougaard says he can offer a turnkey spa operation, he's serious. As well as being able to provide a fully operational spa business with a ready made team of spa therapists, the company has its own product division and spa cuisine.

Serena Spa formulates (and licenses) its own products – comprising five body oils, three hair oils and a complete range of facial products – which are manufactured by a partner company in Rajasthan. Sabrina says having your own product label is important in India to ensure exclusivity, "otherwise you'll be using the same products as some disreputable day spa down the road".

Hougaard says that, for the past two years, the company has also been developing an Indian version of a macrobiotic diet, which they're slowly introducing into select resorts as part of a lifestyle concept. "We believe that the future spa is not just a place where you get massages, but where you're inspired to live a healthier life." They offer cooking classes for



A current focus of the Serena Spa team is establishing quality control within the Indian market

SERENA SPA PORTFOLIO

MALDIVES

- Athuruga Island Resort
- Embudu Village
- Equator Village
- Hulhule Island Hotel
- Summer Island Resort
- The Rania Experience
- Thudufushi Island Resort

INDIA

- Boulder Hills Golf & Country Club (*Aristo Spa*)
- Grand Mercure, Bangalore (*Aristo Spa*)
- Novotel Hyderabad Airport
- Novotel Mumbai Juhu Beach, Mumbai
- RAAS Walled City, Jodhpur
- Radisson Temple Bay, Chennai
- The Metropolitan Hotel New Delhi (*Zen Serena Spa*)
- Hilton New Delhi/Janakpuri (*opening Nov 2010*)
- Royal Orchid Resort, Goa (*Aristo Spa opening Nov 2010*)

SEYCHELLES

- Enchanted Seychelles Round Island (*opening Dec 2010*)
- Enchanted Seychelles Waterfront (*opening Nov 2011*)

hotel F&B staff and guests. In some instances, they can also supply organic produce.

QUALITY CONTROL

Despite Serena Spa's success, not everything has been plain sailing. In 2004, the company's two Sri Lankan spas were destroyed by the tsunami. Although they were rebuilt, tourist figures never recovered and they were shut down. At the moment, there are no Sri-Lankan-based properties.

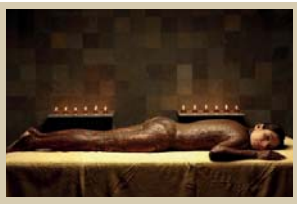
However, the business is undoubtedly moving forwards. It is looking for new resort partners in the Seychelles and in May 2009 it launched the Aristo urban spa brand to target India's business travellers. Hougaard describes it as "a little less fluffy than a Serena Spa as business people have less time, so the treatments have less ceremony." So far, there are three Aristo spas in India and the plan is to roll out 10 more in the next two years.

Another big, current focus for Jesper and Sabrina is in establishing quality control within the Indian spa market.

As the country has very few barriers to entry, there is a large growth of unauthorised and opportunistic spa operators, so the Hougaards have joined forces with some other key figures in the Indian spa industry to help set a nationwide standard for spas.

A major priority is to make recommendations to the Indian government about guidelines for spa training, including a suggested syllabus. A government-approved syllabus would demonstrate that a career in the spa industry is an honourable one and would also enable students to obtain educational loans.

In the longer term, the husband and wife team have a more personal dream – a farmhouse in the hills of Mangalore where they'd like to create their own destination spa with wellness and lifestyle at its core. But, for now, their focus is on maintaining their position in the market and helping their beloved India establish and fulfil its true potential. ●



By 2011, there will be 17 Serena Spa facilities in operation

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WE WILL SURVIVE

The ISPA 2010 US Spa Industry Study shows that the long-term outlook for our sector is positive, yet many challenges lie ahead. We take a closer look



he International Spa Association's (ISPA) 2010 study on the US spa industry confirms positive long-term trends in terms of total spa revenues and visitation levels, despite the downturn in 2009. According to ISPA's president Lynne McNees: "We are ... encouraged to see that the industry remains viable, despite

the economic concerns of the past two years. While not every spa has been able to overcome the effects of the recession, the industry as a whole has weathered the storm quite well."

POSITIVE LONG-TERM TRENDS

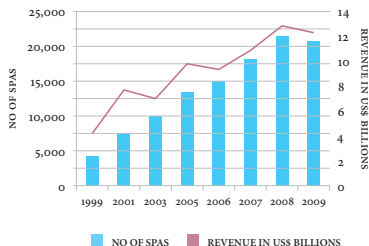
This latest ISPA 2010 study, which reports on 2009 figures, includes responses from over 1,000 survey returns and was conducted by PricewaterhouseCoopers (PwC). The margins of error on the survey are between ± 3.9 per cent and ± 4.7 depending on the slice of the sample in question.

On the supply side, spa locations showed continuous growth from just over 4,000 in 1999 to 20,610 (see Graph 1 below). Although this is a decline on the peak 2008 year, when there were 21,310 spa locations in the US, the long-term trend is nevertheless one of growth.

On the demand side, total spa industry revenue has not increased every year, yet the long-term trend is also one of sustained growth, having risen from US\$4.2bn (£3bn, £2.6bn) in 1999 to US\$12.3bn (£8.9bn, £7.8bn) in 2009. Although most indicators in 2009 show a decline on the 2008 peak year, they still remain above the 2007 figures – the previous high.

Similarly, the number of employees in the spa industry has been consistently increasing from around 125,000 in 2000 to 132,000 by the spring of 2010. Other key statistics from 2009 can be seen in Table 1 (opposite). Overall, all indicators show considerable growth in the long-term.

GRAPH 1: US SPA INDUSTRY – SUPPLY AND DEMAND



GRAPH 2: EMPLOYMENT IN THE US SPA INDUSTRY



REACTIONS TO THE RECESSION

Not surprisingly, for an industry which is so closely tied with employment prospects and personal income trends, between 2008 and 2009 there were declines in:

- Total spa revenues: -4.3 per cent
- Total spa visits: -10.2 per cent
- Total spa locations: -3.2 per cent
- Total square feet: -5.2 per cent (from March 2009 to May 2010)
- Total employees: -2.5 per cent (from March 2009 to May 2010)

The industry has reacted to the economic downturn with a mixture of predictable measures – attempts to increase revenues while controlling costs. According to the report: "Spas have re-engineered their menus and introduced discounts and rewards to incentivise customer loyalty and attract new spa-goers". Promotions – effectively discounting – were introduced by 67 per cent of all spas. This was much higher in hotels/resorts, where 76 per cent reported having introduced promotions in response to the recession. Further, 75 per cent of spas introduced "express treatments of 30 minutes or less".

Given that payroll is the largest cost in the spa industry, it's not surprising that this is where operators turned their attention; 61 per cent of respondents took "one or more steps to manage and reduce costs by reshaping their workforce and seeking greater control over labour costs". Specifically, 38 per cent of businesses reduced employees' hours, 33 per cent "reduced the number of employees" and 21 per cent "shifted full-time staff to a part-time status".

While employment in the industry overall dropped by 2.5 per cent, with a decline in full-time employees (-13 per cent) and contractors (-19 per cent), in fact there was an increase in the number of part-time workers of 22 per cent – there were 112,000 part-time employees in March 2009 rising to 137,000 in May 2010 (see Graph 2, above).



As a result of the downturn, 33 per cent of operators reduced staff hours; and for the very first time, the number of part-time employees is nearly equal to those in full-time employment

PHOTO: ISTOCK.COM/ © AWANA

TABLE 1: KEY RATIOS BY SPA TYPE

Revenue (mean):	All	Day	Medical	Resort/Hotel	Other
Per visit	US\$86	US\$76	US\$132	US\$108	US\$118
Per sq ft	US\$161	US\$185	US\$211	US\$106	US\$183
Per employed person	US\$36,941	US\$34,810	US\$54,692	US\$39,366	US\$38,749
Median per spa					
Revenue	US\$300,000	US\$245,000	US\$437,000	US\$850,000	US\$550,000
Visits	3,616	3,500	2,500	9,000	5,050
Square feet	2,000	1,900	1,900	10,000	2,940
Total employees (% full-time)	7 (43%)	5 (60%)	5 (60%)	21 (48%)	15 (33%)

For the first time, the number of part-time employees has virtually equalled the number of full-time employees in the spa industry.

Although the 2.5 per cent decline in employment seems moderate compared to other leisure sectors, this doesn't take into account the significant shift from full-time to part-time employment. The researchers say: "If each part-time job is considered to be 60 per cent of a full-time equivalent, the decline would have been in excess of 6 per cent".

THE CHALLENGES AHEAD

Many spas used varying forms of discounts/promotions in order to retain volume. The challenge will be, as the report states, to discount "without cheapening the product or damaging reputation". In addition, the danger of discounting is the difficulty in subsequently increasing prices back to previous, or even higher levels. Consumers become accustomed to the discounted price which can subsequently act as a barrier to purchasing at the previous higher rates. Any discounting increases the value-consciousness of clients of all spas, even of those spas that do not discount.

Staffing is a major issue. On the one hand, payroll is at unsustain-

able or unacceptably high levels for 38 per cent of businesses, despite recent downsizing in employment of 6 per cent, as estimated by PwC. Yet, 39 per cent of survey respondents still find a "lack of qualified candidates applying for positions" and find it "hard to maintain qualified management and staff. [Staff have] high expectations regarding wages, perks, etc ... [meaning it is] unsustainable to keep on full-time staff".

But the shift towards more part-time workers has its own pitfalls. Part-timers may be less loyal, particularly when a full-time position becomes available, and according to survey respondents, "better business training and knowledge [is] needed [but we] cannot invest in training due to restrained budgets especially for more temporary staff".

It is clear that there will be further casualties as the industry moves from growth into a mature phase in what are turbulent times. The survivors need to grow demand above all, convincing clients that spas are not only a treat, but contribute to their health and wellbeing. ●

ISPA members have free access to the ISPA 2010 US Spa Industry Study. Non-members may visit www.experiencespa.com, or call +1 888 651 4772 to purchase a study for US\$800.

Giving Well

Philanthropic activities can be a great way for spa companies to give something back while also being good for business. But how can you make sure your initiative is a win-win for giver and recipient?

“To give away money is an easy matter and in any man’s power,” said Aristotle. “But to decide whom to give it, and how much and when and for what purpose, is neither in every man’s power nor an easy matter. Hence it is that such excellence is rare, praiseworthy and noble.”

Every bit as relevant today, these words will no doubt ring true to any operator or supplier which has delved into the world of spa philanthropy – giving either money, products or time to support a charity. How to pick a beneficiary from the multitude of good causes out there, and how to make sure their contribution is well used, are age-old challenges.

And with the reverberations of global recession still being felt, the challenges of good giving are even greater than usual. With payroll, marketing and capital spending all being cut, can a business really justify giving anything away? Inevitably, it’s easier if it also benefits the business. Charitable activities generate ample PR and marketing opportunities and, for some companies, choosing a cause that reinforces its own brand can be particularly advantageous. Others cite the value of philanthropy in motivating staff. In *Bloomberg Businessweek* magazine earlier this year, Tae Yoo, senior vice-president for corporate affairs at Cisco, was quoted as saying that internal surveys had shown that “people would stay at a job with less money if they believed the company was responsible... it’s an employee recruitment and retention strategy.”

Of course, the old adage – ‘giving is its own reward’ – is also true, and nowhere more so than in an industry which prides itself on helping and healing others. The challenge is how to maximise the benefits for all concerned. Here, some of those who have tried and succeeded share their experiences...



Sense of Touch day spas in Hong Kong collaborated with Plan International with the aim of sponsoring 100 Nepalese children

Elemis recently partnered with new British charity Mothers4Children, which supports disadvantaged children in the UK and Romania

SEE FOR YOURSELF

Oriele Frank, director of marketing, Elemis

The skincare supplier has recently partnered with new British charity Mothers4Children, which supports disadvantaged children through existing charities Kids Company in the UK and FRODO in Romania.

“We chose Mothers4Children partly because one of their charities, Kids Company, is on our doorstep. This allows us to help them on a more personal level, providing practical as well as financial support. We work very closely with Heart Yard, its therapy centre where vulnerable parents can get treatments while their children are cared for. We share our expertise and provide stock so their staff can focus on nurturing clients.

We also offer a complimentary treatment at our day spa to one member of Kids Company staff a week. Seeing the results of our work first-hand has really motivated our staff to get behind the initiative and made everyone much more passionate about it.”





Marine skincare company Thalgo joined forces with the Marine Conservation Society and activities included staff participating in beach clean-up days

"Seeing the results of our charity work first-hand has really motivated our staff to get behind the initiative and made everyone more passionate about our partnership"

INSPIRE YOUR STAFF

Neil Orvay, CEO, Asia Spa & Wellness

The operator of Sense of Touch day spas in Hong Kong has teamed up with Plan International, a global children's development organisation, with the aim of sponsoring 100 Nepalese children in need of more healthy living conditions and educational support. Sponsoring a child costs HK\$200 (US\$26, €18, £16) a month and for every child backed by a spa guest, Sense of Touch matches the commitment by supporting another child. So far, 30 children have been sponsored.

"We'd been looking for a charity initiative for some time, but wanted to avoid just donating money without any interaction. The Plan International scheme allows an entire company and its clients to get involved, while targeting a specific group of people who need help. Our choice of Nepal was inspired by the fact that most of our staff are Nepalese – we wanted to give something back to their country and inspire them to get involved. They selected the regions we would focus on and several now communicate directly with the sponsored children. Next year, we hope to go to Nepal and meet some of them."

BOOST YOUR BRAND

Marian Green, CEO, Thalgo UK

Last year, the marine-based product supplier partnered with the Marine Conservation Society (MCS), donating a proportion of revenue from five products sold during the year to raise £10,000 (€11,300, US\$15,900). Staff also participated in beach clean-up days.

"For a fundraising link to benefit both sides of the partnership, it must be credible and relevant, so it was vitally important to us to choose a cause that was true to our brand. We pride ourselves on being responsible in our use of marine ingredients, so supporting the MCS was one way to show we understand how precious the ocean is. Donating a proportion of revenues rather than profits was a risky strategy, but we benefited in terms of the increased marketing visibility, while the hands-on element with the two clean-up days was extremely important in bringing the MCS partnership to life for both staff and clients."



GO NATIONAL

Mona Sappenfield, owner, Mona Spa, Memphis, Tennessee

Mona Sappenfield was the recipient of the Day Spa Association's Philanthropy Award 2010. Last year, Sappenfield supported the American Heart Association's (AHA) Go Red for Women campaign, raising more than US\$5,000 (€3,600, £3,200) through a Valentine's Day Gift Card promotion at the spa and chairing a luncheon, which raised a further US\$115,000 (€82,300, £72,600).

"I chose to support the Go Red campaign because statistics show that my county is one of the highest-risk areas in the US for obesity-related heart attack and stroke. I knew that the AHA funded our three local research hospitals and I knew that women were really the caretakers of a family's health. So with our client reach, it was a very good fit for us. As the owner of a very small company, I also felt we could have a broader impact by working with a large organisation. Another advantage of choosing a national campaign was that AHA provided a liaison member, who helped with the administrative details to avoid burdening my own staff."

"At Rancho La Puerta, our guests are invariably gratified to find that a business they're supporting is making such a difference to the local community and environment"

▶ INVOLVE YOUR GUESTS

Dorothy Purdew, chair,
Champneys Health Resorts

For many years, the UK-based destination spa chain Champneys fundraised for a chosen 'charity of the year'. However, in 2006, the independent non-profit organisation Champneys Charitable Foundation was established. Purdew has been awarded an OBE for her services to charity and the spa industry.

"Before we set up the foundation, we felt that donating to a single, large charity that was known to our guests was the most transparent route. Becoming a registered charity has allowed us to support a greater number of good causes, including individuals and small charities that are often forgotten about. One way we raise money is to give our guests the option of donating £1 (US\$1.60, €1.10) when they settle their bill, which makes around £50,000 (US\$79,000, €57,000) per annum. Because of this, it's very important that our guests feel connected to our charitable efforts, so we always invite them to nominate charities they'd like us to support. We also encourage guests to join staff on our annual charity bike ride as well as on our overseas fundraising challenges, which have included expeditions to the Great Wall of China and Machu Picchu. Our next challenge is dog-sledding in Norway!"

BE PART OF SOMETHING BIGGER

Monique Iacobacci, executive director, SpaCare

A US-based non-profit organisation, SpaCare are founded 'to unify, organise and manage industry-wide participation in community and national charitable events'. The organisation provides planning, marketing and PR support, as well as hosting awards, fundraising and networking events throughout the year (spacarecharity.org).

"Partnering with a larger organisation such as SpaCare can be beneficial for a number of reasons. Spa owners and managers often don't have the time or experience to plan a charitable event or campaign in a way that gives them maximum results. Participating in one of our joint initiatives can ease the stress of that process while creating prime opportunities for media exposure. Non-profit organisations have marketing budgets set aside, as well as large databases and a variety of opportunities for target market outreach. They may also use an array of awareness tactics, such as website pages, press releases and educational pamphlets. There are also people on hand to guide you through the event planning process, which may end up saving you time and money when you launch your own campaign."



Fundación La Puerta initiatives include ongoing programmes for children at an education centre

BREED GOODWILL

Laura Silvan, executive director,
Fundación La Puerta, Mexico

Fundación La Puerta is a non-profit organisation affiliated to the destination spa Rancho La Puerta in Tecate, Mexico. Founded in 1977 by Deborah Szekely and the ranch's then general manager, Jose Manuel Jasso, it is dedicated to protecting the environmental and cultural heritage of the region and promoting a sustainable way of life. Under the current presidency of Szekely's daughter, Sarah Livia Brightwood, initiatives include ongoing programmes for local children at Las Piedras: an education centre for schools within a 28-acre (11-hectare) park.

"Although we get funding from a variety of sources, the ranch is our main sponsor, covering 75 per cent of our budget. Most recently, it's launched a new skincare line, with all proceeds coming directly to us. The mutual benefits of the relationship are clear. We work with many children from families of ranch staff, and there is a close, affectionate relationship between the employees of the two organisations, and happy staff are good for business. We provide tours of Las Piedras for anyone who's interested, and guests are invariably gratified to find a business they're supporting is making such a difference to the local community and environment." ●



Fundraising for Champneys staff and guests included an expedition to the Great Wall of China



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DEEPER UNDERGROUND

Renowned French designer Jacques Garcia has created a magical, mysterious spa in the basement of Marrakech's La Mamounia hotel. But how well does his spa work operationally and how's the business measuring up?

With more than 40 large-scale projects completed each year, Jacques Garcia is one of the most sought-after French interior designers. His career took off in the early 1990s when he established a relationship with the French hotel group Lucien Barrière. He went on to renovate some of the groups most prestigious properties, including the Hôtel Majestic in Cannes and his creations stood out because of their personality and opulence, at a time when minimalism was all-pervasive.

Garcia is still well known for his outstanding designs and spas he's worked on include those at the Hôtel Metropole Monte-Carlo (see SBo6/2 p44) and the U Spa at Hôtel Fouquet's Barrière in Paris.

He also specialises in rejuvenating iconic places, with his most recent project being La Mamounia in Marrakech. Famed for being Winston Churchill's favourite hotel, the property reopened in September 2009 following a major three-year renovation.

Against the grain

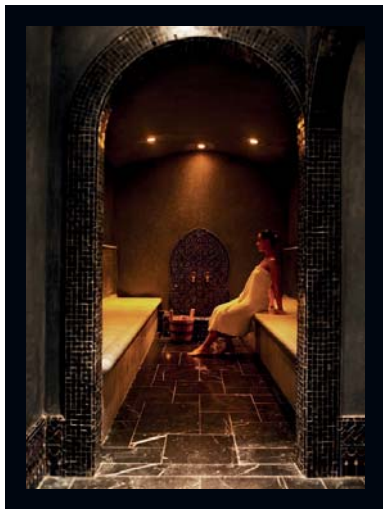
Situated towards the centre of Marrakech, on the edge of the walls of its old city, La Mamounia is named after its 200-year-old gardens which still surround it today.

The city is certainly in demand: there are currently 15 luxury hotels in various stages of development (see p44). However, La Mamounia captures attention with its impressive Moorish architecture and the way that Garcia has recreated the luxurious mood of Oriental palaces.

The opulent style of the hotel continues through the 27,000sq ft (2,508sq m) spa which is situated in the basement (see p42). Intricately crafted lanterns and archways add authenticity, while black marble floors and dark blue walls create a sensuous and alluring atmosphere.

Marianne Nielsen, the Danish regional spa director at La Mamounia says: "Being given an underground space must be a tremendous challenge for a designer. Garcia has changed the way we look at spas by creating an inward, instead of outward, journey. From a young age, he travelled with his family and experienced old, mysterious hammams, and that's where his inspiration came from.

"The spa guests love it. They say they find it extremely calming and the low lighting gives it a subdued but cocooning sensation."



While paying homage to traditional Morocco with features such as two hammams (left), the spa also has a many modern touches (above)



Standout features include a decorative water basin (above) and plasma TV friezes in the reception (below) that display illuminated, changing patterns

Nielsen, who also oversees the spa at La Mamounia's sister property in northern Morocco, says that having a spa designed by Garcia has brought more kudos to the development and nearly all tourist guides list the hotel and spa as a must-see attraction.

"I think big designers such as [Philippe] Starck and Garcia love creating spas because they themselves are spa-goers. Garcia has had many treatments with us and it's something he's passionate about. However, he was humble enough to say: 'Listen, I don't actually work in a spa, so how can I design something for you?'"

With a 24-year career in spas worldwide – working for operators such as Hyatt and La Manga – Nielsen was only too happy to give advice. Yet, in hindsight she says she would have created more private/couple's hammams (there are only two standalone ones, plus one in the spa suite) because of their popularity.

Hitting the ground running

While paying homage to traditional Moroccan themes, La Mamounia's spa also has many modern touches. Plasma TV friezes showing illuminated, changing patterns and birds in flight, for example, provide a backdrop to the reception and corridors.

Similarly, the product houses reflect both the country of origin and more contem-



porary ranges. The marocMaroc line and the spa's five signature, own-brand products have all been made from locally sourced ingredients. Shiseido products which are from Japan are also used. "Everybody expected us to pick something French," says Nielsen, "but we chose Shiseido because it had a good balance of core body treatments and its cosmetic collection also gave it a fashionable edge."

The spa at La Mamounia offers a staggering 80 treatments. "There will always

be one person who wants something exotic or different and our focus is on customer service and to give them what they want," says Nielsen. "The core of our menu is the Moroccan hammam treatments and other body massages and facials. These are our top sellers and so we've put them at the front, rather than making guests trawl through everything else as a marketing ploy."

Something is certainly working because only a year after opening, each spa guest has an average of three treatments and the treatment room occupancy sits at 45 per cent. "The capture rate is easily a minimum of 20 per cent, sometimes more, but what we're finding is that the average length of stay has increased and guests don't leave the hotel, they stay here." This means that the spa, which works as an independent profit centre, is already 20 per cent above revenue projections. "I've worked in spas that make a lot of money, but I've never seen one start out this fast," adds Nielsen. "We've really hit the ground running."

Hotel guests make up the majority (87 per cent) of spa customers at La Mamounia. But there is also big demand from visiting day spa guests. Nielsen says getting the balance between these two groups right is "very delicate". She says: "We don't want to be overrun by tourists and we want to control this." Therefore, off-site clients must ▶



MARRAKECH RESORT SPA

- buy a pass, which permits access to the spa, the indoor and outdoor pool areas and the fitness centre. There are day, weekend, week and month-long spa passes on offer which range from MAD500 (US\$62, €44, £39) to MAD8,000 (US\$989, €710, £626). She can monitor spa bookings via the TAC Reservation software and, if hotel occupancy is 70 per cent or more, passes are restricted to ensure that those staying on-site have priority use of the spa.

Hand-picked therapists

So what does Nielsen think is the key to the spa's success? "As a spa director I am dependent on my team," she explains. "I know there's nothing special about what I'm saying, but it's so true."

Having been at the spa a year before opening, Nielsen hand-picked the its 21 full-time therapists. "The pool of qualified therapists in Morocco is incredibly small, so in the beginning I had to go to different spas to look for therapists," she recalls. "But even then we were really strict with our interviews – I think we only hired one out of every 10 applicants because we wanted the best in the market."

"We wanted therapists who were technically competent, but we also looked closely at why they were in the industry. Did the therapist want the job as a means to an end, or was it because they had a gift and were just naturally 'giving' people?"

As the majority of therapists – and indeed most other staff – were not used to working

LA MAMOUNIA HOTEL AND SPA BY NUMBERS

- The hotel has 209 rooms
- Thirty-five per cent of hotel guests are French, 20 per cent are American and Canadian and 10 per cent are British
- The average length of stay is three days
- Average hotel occupancy is 60 per cent
- Spa facilities consist of: two single and one couples hammam; a spa suite; a diagnostic room and nine treatment rooms; a hair salon by Jean-Michel Faretta Paris; a relaxation room; six outdoor massage cabins; a whirlpool; an indoor and outdoor pool; a fitness studio with Life Fitness equipment and Kinesis exercise room; two manicure and one pedicure cabin
- The five signature products include a black soap, ghassoul (a local clay), orange flower water, rose water and argan oil
- A 60-minute hammam ritual costs MAD900 (US\$111, €80, £71)

in high-end hotels, however, La Mamounia invested significantly in their training.

"One of the main challenges I'm going to face is losing staff to other spas – there are 19 five-star hotels due to open here in the next five years," says Nielsen. "And you should always be respectful of your competition."

To keep therapists, Nielsen says that the hotel's general manager made a "very astute decision" early on to pay 20 per cent above

The indoor pool (above) is ozone-treated while other water facilities include an outdoor swimming pool and a whirlpool

the market rate, plus offer high-level training and healthcare packages which aren't always given in Marrakech. "It's worked well so far because not a single person of has left," she says.

In addition, Nielsen believes strongly in employee wellness: "I schedule one hour treatments, but always leave 20 minutes in-between. I want to make sure customers get the best service but also that my therapists don't get exhausted. I control how many massages they have in a row, so if they have more than three I put a break in. It may mean that I lose clients, but the ones that I have been able to fit in will always come back."

The next generation

This loyalty to staff, is what Nielsen says keeps her driven. "I have a duty to teach the next generation and form other spa directors. Many of my past assistants have gone on to have hugely successful careers – Steven O'Neal [now spa director at The Setai Wall Street, US], Pedro Lopez [spa director at Grand Hyatt Santiago, Chile] and Jane O'Brien [spa director at La Quinta Melia in Spain]. These people are like my kids – they call me 'spa mummy' and I'm very proud of them. I want to do what I've done for them in Morocco." ●

For more on other spas in Marrakech and upcoming hotel developments, turn to p42 ►



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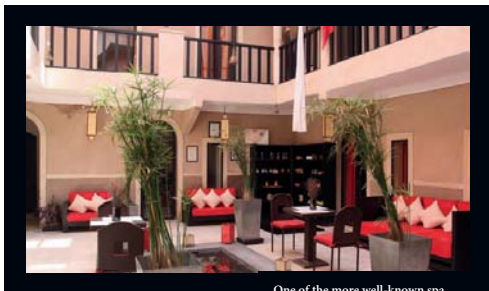
An overview of the spa market and pipeline developments in Marrakech: the red city

Dominated by sprawling pink, red and ochre coloured buildings, Marrakech is a hub for international tourists. In fact, tourism is its main economic activity and the Moroccan National Tourist Office is promoting the city to families, golf, sport and adventure enthusiasts, luxury and fashion-conscious travellers and wellness seekers alike (see www.marrakech.travel).

Since 2009, over 10 top hotels have launched, with at least 15 more in development. Hand in hand with the high-end hotels come impressive spas, such as those at La Mamounia (see p40) and Es Saadi Palace which has just been unveiled (see p14).

Riad retreat

As well as hotels, many riads (traditional houses) have been transformed into spa businesses which combine the authentic hammam experience – where guests are scrubbed and cleansed vigorously in a



One of the more well-known spa businesses within a riad is the ISIS spa (above), while day visitors flock to the Spa at Le Beldi Country Club (below)

heated room – with pampering massages. These mostly comprise up to five treatment rooms, plus hammams and steamrooms, relaxation areas and sometimes pools. Some of the more well known include Les Bains de Marrakech (see SB10/2 p64), Maison d'Arabe and ISIS spa.

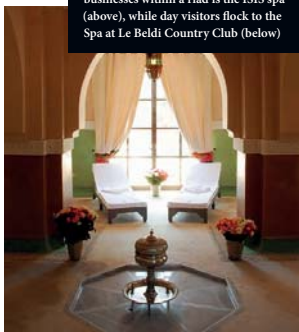
Leila Zouet, a trained therapist and owner of ISIS, opened her first facility in the heart of the souk area four years ago, followed by the smaller Medina Spa just off the central market square Jemaa el Fna.

"We attract the tourist market," says Zouet, "so we offer several triple massage rooms for groups of friends, rooms for couples and also a family experience." At ISIS, there are also three bedrooms designed especially for séjour bien-être (a wellness retreat).

Zouet is clear that the success of spas in Marrakech lies in their quality of service. Having worked as a therapist, she undertakes much of the spa training herself.

Country charm

Located on a 15-hectare (37-acre) site with 13,000 rose bushes, on the city outskirts, Le Beldi Country Club competes by drawing in day spa visitors who want to escape the city – hotels even organise excursions to it. "Although luxurious, most spas in Marrakech



hotels are underground or boxed in," says French owner Jean-Dominique Leymarie. "Our spa isn't. It is big, has lots of natural light and beautiful, open surroundings."

The business started as a conference destination six years ago and, three years later, the 6,450sq ft (600sq m), nine treatment room spa, swimming pool and restaurant followed. This may saw the completion of a 28-bedroom boutique hotel.

Beldi means 'traditional' in Arabic and, while undoubtedly modern, the grounds – including the buildings constructed using old-fashioned daubing techniques – have a charming country appeal. ●

DEVELOPMENT PIPELINE

These companies are planning to open hotels in Marrakech in the next few years*:

- Four Seasons Hotels & Resorts (opening early 2011)
- Beachcomber Hotels & Resorts (opening mid-2011)
- Assoufid (part of the Rocco Forte Collection, opening 2011)
- Baglioni (boutique hotel with private residences designed by Jade Jagger, opening 2011)
- Fairmont (opening 2011)
- Park Hyatt (opening 2011)
- Jawhar Estate (opening late 2011)
- W (opening late 2011)
- Marriott (luxury golf hotel opening 2012)
- Banyan Tree (opening tbc)
- Mandarin Oriental (opening tbc)
- Ramada (opening tbc)
- Royal Ranches (exclusive equestrian facility with hotel, opening tbc)
- Samanah Country Club (golf resort, opening tbc)
- Suite Hotel (by Accor, opening tbc)

*Source: Moroccan National Tourist Office

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For a first-person account of the Camp Reveille experience turn to p50

JOAN LUNDEN & JEFF KONIGSBERG

US TV star Joan Lunden and her camp-owner husband Jeff Konigsberg believe camaraderie and playfulness are just as important to wellness as fitness and spa treatments. Here, they talk about the 'spa camp' concept they created and how they plan to roll it out

It's safe to say that Joan Lunden knows about multi-tasking. As the presenter of *Good Morning America*, Lunden, 60, was the sweetheart of US breakfast TV for 17 years, and in the 13 years since she resigned she's never been far from the small screen stateside. In addition, she is the author of eight bestselling books on healthy living and parenting; has a packed nationwide speaking schedule;

and champions numerous campaigns – all while being the mother of seven children: three daughters from her first marriage and two sets of boy-and-girl twins (aged five and seven) with Jeff Konigsberg, who she married in 2000. "It's a little bit of a noisy household," laughs Lunden, "but we run it like camp!"

This is something Konigsberg, 50, is certainly well equipped for. As the owner and director of two summer camps for children

in Maine – the 65-year-old Camp Takajo for boys in Naples and 100-year-old Tripp Lake for girls in Poland – Konigsberg is a lifetime believer in the power of the American camp concept (where parents send their children during the summer break from school) to mould boys and girls into well-adjusted men and women. This is not just market-ing spiel – Konigsberg himself was a camper at Takajo from the age of nine, and later a camp counsellor, then associate director, before he finally purchased the site in 1988.

It was Lunden, however, who first came up with the idea of holding a weekend wellness retreat for women at Camp Takajo, and in August 2007 – at the end of the children's camping season – the first Camp Reveille ('reveille' meaning 'wake-up call') was launched at the site. Now in its fourth summer, the four-day, three-night camp attracts around 150 women a year (see p50), and last April Lunden and Konigsberg took the concept on the road for the first time, launching a Reveille retreat at the Ritz-Carlton Dove Mountain in Arizona. Speaking to *Spa Business*, the couple explain their vision for a wellness concept that has fun and community at its heart.



Camp camaraderie encourages women to try out new and different activities (above)



While Jeff runs the children's summer camp, at spa camp he steps back and lets Joan take the lead

HOW DID YOU COME UP WITH THE IDEA FOR CAMP REVEILLE?

Joan: Every summer, I would go up to Camp Takajo with Jeff and our family, and by the end of the season, I'd think, 'Wow, I'm in the best shape! I'm happy, relaxed, fit and healthy, and at peace with nature, my body and myself. If only I could bottle this and sell it!' So I said to Jeff, 'Look, I'm all across America, speaking to women's groups and appearing on TV, campaigning about the importance of staying healthy, and you have this amazing facility - I'm going to run a women's wellness camp right here.' The following summer we ran the first Camp Reveille.

HOW DO YOU SPLIT THE RESPONSIBILITIES?

Jeff: I'm the back-of-house guy. All summer long, I'm the camp director, the one in front managing everything. So at Camp Reveille I happily take a step back and support Joan while she leads the walks, participates in classes and lends every aspect of her body and soul to this venture.

"At the end of [kids] camp, I'd think 'wow, I'm in the best shape... so happy, relaxed and at peace with my body... if only I could bottle this and sell it'"

HOW DO YOU STAFF THE CAMP?

Jeff: We select Camp Takajo counsellors to assist the specialist staff that Joan hires.

Joan: I have a wonderful personal trainer, who helps me put together a programme and hire all the other fitness instructors. Murad sends me aestheticians [Joan is the face of Murad's Resurgence skincare line], and for the last two years, I've also hired a dermatologist to do melanoma skin checks.

WHAT MAKES THE REVEILLE CONCEPT DIFFERENT TO OTHER WELLNESS OFFERINGS OUT THERE?

Joan: One thing it has over the spa experience is that if you go to a spa, once you're in your room, you close the door and you're

alone. When it comes to dinnertime, if you're travelling by yourself, you have to walk into the dining room alone. That can be very hard for women. At Reveille, the women all arrive together and share bunks [in dormitories] so no one has to be alone - whatever you're doing, there's a whole bunch of you, and that makes it so much easier to challenge yourself and try new things. You know the old saying, 'it takes a village [to raise a child]'? Well, at Reveille, at the bottom of the climbing wall or on the tennis courts, there is a village. These women are cheering each other on and it really boosts their confidence and self-esteem.

Jeff: We also offer added-value components, which you don't usually get at spas, such as campfires under the stars and the Reveille Relay, a 'wacked-up relay' where every camper has the opportunity to complete an event as part of a team. That doesn't mean they have to do something out of their comfort zone, such as running around a field - it might be something simple or silly such as whistling a song...

Joan: ...or eating six saltine crackers and then whistling a song!



The spa camp is more than just a holiday or break, it's a bonding experience that boosts self-esteem

► Jeff: Overall, it makes for a very special, even life-changing experience for these women.

A RITZ-CARLTON RESORT IS VERY DIFFERENT FROM A CHILDREN'S CAMP - WHY DID YOU CHOOSE THAT FOR YOUR FIRST REVEILLE-ON-THE-ROAD?

Joan: We've been marketing Camp Reveille through SpaFinder Inc for the last couple of years, so when we started to think about rolling out the concept they put out feelers to a number of different spas and resorts, all of which were interested in working with us. Ritz-Carlton was looking for ways to build awareness of its Dove Mountain resort and they really rolled out the red carpet - so it was a very comfortable way to dip our toe in the water.

Jeff: Also, Ritz-Carlton is known for its great service, and if I was going to lose my back-of-house role, we wanted the comfort of knowing the programme would be run in a very professional manner. Ritz-Carlton gave us that comfort.

HOW SIMILAR WAS THE RETREAT TO CAMP REVEILLE IN MAINE?

Joan: We have more sporting facilities at Takajo, so we couldn't offer as many activities at Dove Mountain. But in addition to tennis clinics, Murad facials and inspirational campfires, we were able to have a golf clinic

"We're in talks with half a dozen resorts... The goal is to hold four retreats a year in different parts of the country, and maybe one in the Caribbean"

which was unique to that venue. We had about 45 women, so it was a smaller group - though that's partly because we didn't start marketing it until about three weeks before! But they've asked us back again next year, so it worked for them and it worked for us and it worked for the women who came.

WHAT'S THE NEXT STEP IN ROLLING OUT THE CONCEPT?

Joan: We're in talks with half a dozen resorts, looking at business models that will work for them and for us, while still keeping the price palatable for women, who often feel guilty about spending money on themselves. The ultimate goal is to hold four retreats a year in different parts of the country, and maybe one in the Caribbean.

Jeff: The immediate goal for 2011 is Dove Mountain in the springtime, Takajo in the summer and a third camp in the fall - we currently have a shortlist of places we're entertaining for next October.

Joan: We'd also consider holding a second session at Takajo if the demand was there.

AT US\$1,500, REVEILLE AT DOVE MOUNTAIN IS MUCH MORE THAN THE CAMP IN MAINE AT US\$899 PER PERSON. HOW WILL YOU KEEP PRICES DOWN IN OTHER LUXURY RESORTS?

Joan: I think there are two marketplaces. There were some women who came to Reveille in Arizona who we couldn't talk into coming to camp in Maine, but they said, 'tell us when you're holding one at another Ritz-Carlton and we're there!' At the same time, I know many of those who come to Maine would be put off by the price in Arizona, and quite frankly wouldn't be that enticed by the experience anyway. So we're exploring all kinds of venues - the only restriction is to keep it below a certain price point.

WHAT'S IT LIKE WORKING TOGETHER?

Joan: He totally gets how I want to touch the lives of other women and supports me 100 per cent, so it's been a lot of fun and I've learned a lot from him. I've been a TV host and an author and a speaker, but I've never run a business. Jeff has a great business mind and I couldn't have done this without him. Jeff: When you share a passion as a couple and then share it on a larger stage, that's very exciting. Also, we're both very busy people with seven children, yet we have to find time for each other and take care of our own health and wellness. This is a great opportunity to do that. ●

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The camp has been created for women to take time for, and better care of, themselves



Every morning between 8-9am, Lunden (far right) leads a walk or running session



The medical clinic is turned into a spa offering Murad facials



CABIN FEVER

Susie Ellis bunks down at Camp Reveille, a women's only spa camp ran by TV personality Joan Lunden, and shares her experience of cabins, treatments, creativity and bonding

As those in the spa industry will know, two powerful trends have been on the upswing over these last couple of years: hybrid spas, ie spas that strongly incorporate another element such as medicine or wellness; and social spa-ing. In SpaFinder's 2010 trends report, we noted that spa has increasingly become a hyphenated affair – think spa-yoga, spa-fitness, etc – and that the industry is getting pretty creative at inventing new you-name-it hybrid models. And in our 2010 State of Spa Travel report, travel agents worldwide ranked social spa-ing as the number one trend gaining ground, reporting they see significantly more friends, groups and families hitting spas to connect or 'play'.

So, it's not surprising to see 'spa-camp,' a concept that so neatly straddles both trends, hit the landscape. I always try to sample as many emerging spa trends as I can, but recently I was fully immersed in a spa camp, spending four days at Joan Lunden's Camp Reveille in Maine in the US. I'm recounting my personal experience there to offer a little first-hand insight into the special qualities and appeal of this concept.

RESOLVING THE PARADOX

Joan Lunden, a well-known TV personality in the US (see p46), approached SpaFinder two years ago to help her market her Camp Reveille, a four-day summer camp for women that she created out of her passion for helping women take time for, and better care of, themselves. This summer she invited my colleague Sallie Fraenkel (COO of SpaFinder) and me to join her and 140

"Will spa camps become a full-blown trend? The jury is out. Will more models – from luxury or family-focused ones to boot camps – appear? Without a doubt."

other women at Camp Reveille, explaining that the experience would feel like an adult version of a kids camp, but one that included massages, facials, and a heavy roster of fitness, sports, activities and social experiences. So, I decided to sew my name into my gym clothes, pack my duffel bag and give it a whirl! I was exceedingly curious to

see how this nascent trend, this interweaving of 'camp' and 'spa,' would play out.

On the drive up to Maine, I thought about what seemed like some obvious paradoxes. I hadn't been to camp since I was a young teenager, and remembered loving the swimming, canoeing and eating s'mores [marshmallows and crackers] around the campfire, but not relishing the hard bunks, the bugs, the poison ivy and sharing showers.

Spa, of course, connotes pleasure and the luxury, pampering touches. When we arrived at Camp Reveille, I saw that some of these paradoxes were resolved. It's held at a posh boys' camp owned by Joan's husband, Jeff. When regular camp season is over she adds extra touches like foam padding and comfy bedding for the bunks – and latte machines, lamps, and surprise gifts in each cabin. The medical clinic area is transformed into a spa where women can receive massages and facials.

It became immediately apparent that the staff at Camp Reveille were top notch: the therapists, aestheticians and fitness instructors are all personally selected by Joan – and many are 'her people,' ie her celebrity hair stylist and makeup artist. It's probably the

Joan Lunden will be offering additional spa camps in 2011. To find out more about her and the Reveille-on-the-Road rollout, turn to p46.



Being surrounded by nature has a profound effect on women at the camp, many of whom live in cities

best collection of spa staff I've ever seen. And, surprisingly, at US\$899 (£643, £571) for four days/three nights (which includes all the fantastic food and a facial), it's really quite a bargain!

A typical day at Camp Reveille includes the following:

7am: breakfast
7.30-8am: tai chi on the beach
8-9am: walk with Joan or morning run
9.15-10.30am: pilates, beach yoga, cardio, core and sculpt class, or arts and crafts activities
10.45am-12pm: archery class, Zumba, yoga, self-defense or arts and crafts activities
12.30-1.30: lunch in the dining hall
1.30-2.15pm: rest, Eat your Way Fit talk or Unclutter Your Life lecture
2.15-3.15pm: the Reveille Relay
3.15-4.15pm: boot camp challenge, archery class, canoe class or arts and crafts activities
4.30-5.50pm: volleyball, Zumba, gentle yoga stretch or arts and crafts activities
5.30-6.15pm: shower time
6.30-7.30pm: dinner
8-9pm: dance party
9pm: campfire and eating s'mores and after that playing cards and games and watching movies in the late evening.

Other interesting offerings throughout the four days included: a mole check by a dermatologist, tribal drumming, a pontoon cruise, LifeBreath (a unique breath-work practice taught by the woman who originated it), sing-a-longs, an insight into Joan's make-up secrets, meditation, climbing walls, and tennis. And of course, facials and massages that could be scheduled any time – a 30-minute Murad facial was free, but massages cost US\$70 (£50, £44).

EMBRACING CREATIVITY

Whew... as you can see the daily agenda was completely packed, however, we were also encouraged to do as we pleased, even if this meant doing nothing at all. It wasn't long before I realised that the schedule I was opting for looked suspiciously similar to my favourite spa routine: long early morning nature walks, some cardio classes, a massage – and in the afternoon, maybe a stretch class followed by a nap.

On the first day, Sallie noticed that I had quickly reverted to my typical spa routine and suggested I shake it up a bit. She nudged me – or maybe dragged is a better word – into the arts and crafts centre. When there are spa activities available, the last thing

I really wanted to do was sit in a barn-like structure stringing beads or working with clay pots. I noticed that lots of women were participating – they seemed to be having fun – and the sparkling assortment of beads and baubles looked interesting, but nevertheless, I passed.

That afternoon an odd thing happened. I attended the Chakra Balancing session, where the instructor had us lie down and then passed a pendulum over our various chakra points to check our energy. Well, my chakras checked out pretty well over my body. Then she reached the chakra point over my head and all of a sudden – nothing. No swinging. No energy.

She gently mentioned that this chakra point represented creativity and that possibly the imaginative part of me was suppressed. Yeah, right... if you believe that kind of thing. But later that night I got to thinking (a left-brain activity, hint, hint) that indeed much of my life is filled with lists, emails and analysis. I embrace very little right-brain activity: virtually no music, painting, drawing or dance (and definitely no arts and crafts).

So, reluctantly, the next day, I accompanied Sallie to the jewellery-making room, ►



Susie (far left) and Sallie (third right) found the four-day spa camp fantastic fun and filled with laughter

▶ thinking that injecting a little creativity into my day might do me some good. Well, the beautiful blue and white speckled stones, silver pearls and sparkly beads became mesmerising. Before I knew it, a couple of hours had passed and I had created an attractive piece of jewellery. In fact, Joan's mother-in-law liked it so much she asked if she could copy it!

When Sallie and I left camp four days later, we drove off feeling truly renewed. And although I haven't tested my creativity chakra post-camp, I do feel that my inner child was positively nudged at Camp Reveille.

UPON REFLECTION

Several months have now passed since my summer spa camp experience, giving me time to reflect on how it affected my life and what, specifically, is so different about spa camp, compared with other spa experiences. Three things stand out:

Firstly, **camp was fun!** I have been to many spas and they have all been relaxing, restful, gorgeous and inspiring – but rarely fun. I have not laughed hysterically with a group at a spa for days on end, played volleyball, told stories by the campfire and cheered for my relay team. Laughing and hearing laughter was truly refreshing!

Secondly, the **creativity element**, in my case, the jewellery making, added a dimension

that is on the rise, but still too rare at spas. While destination spas (in particular) are beginning to offer creative programming like drumming, journal writing, photography, cooking classes and gardening, other spas could put more emphasis on offerings that elicit people's creative and emotional sides. For so many of us, especially the tech-connected and work-obsessed, they have unique therapeutic value.

"Spas could put more emphasis on creative programming like drumming, journal writing and photography as they have unique therapeutic value"

Thirdly, **being immersed in nature** had a profound effect on me: the trees, grass, clear sky and the way the campfire danced against the backdrop of the dark lake, remain emblazoned in my mind. While nature is a part of many spa experiences, it's usually limited to a hike, an occasional outdoor yoga class, or a view from a window. Lying in the grass, climbing a tree or sleeping under the stars are too rare experiences and they have a powerful effect on a person like me who resides in a concrete city.

Were there any negatives? Well, the greatest challenge came from something inherent in the camp group-lodging scenario. I shared a cabin with five other women, and the positives were laughing, sharing life stories and bonding – but the downside is that we're older adults and inevitably someone would have to use the bathroom in the middle of the night and a couple of my cabin-mates snored. Several of us couldn't sleep, and while I don't have a solution to this aspect of spa camp, it's an issue, because sleep is such a crucial part of de-stressing and rejuvenation.

THE CAMP TREND

Camp Reveille was an extraordinary way to immerse myself in the intersection of spa and camp, and it's a marriage of concepts that has come to my attention more widely recently. Luxury hybrids include: the Four Seasons Tented Camp Golden Triangle in Thailand, with open-air spa salas blending into the bamboo forest; and The Resort at Paws Up in Montana, which has an entire 'spa town' comprising individual treatment tents. And there are now many spa-focused camps for kids and teens.

Will spa camps become a full-blown industry trend? The jury is out. Do I think more spa camp models – from luxury or family-focused ones to weight-loss/fitness boot camps – will appear? Without a doubt. ●



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O.P.I

turnaways

PHOTO: ISTOCK.COM/NIKOLAI GUIDO

What kind of routines could be put in place to help receptionists log turnaway data quickly and easily?

Most operators are reluctant to reveal how many customers they turn away, and with pressure to prove their worth to shareholders and owners it's easy to see why they don't want to admit a customer has slipped through the net.

Off the record talks have revealed the percentage of customers turned away can range from 5 to 25 per cent or more. And all agree that this can fluctuate according to the type of spa, time of day and week and location.

In Asia – where spas typically open for longer and have more therapists due to lower labour costs – it's rare not to be able to accommodate a customer. A destination spa is also likely to have lower levels of turnaways, as guests are on-site for the whole day and can usually fit into scheduling that suits the spa. Yet day spas may have a higher level of lost business, as customers tend to opt for peak times and aren't as flexible.

However, it's the recording of lost business and subsequent analysis of trading patterns

Some spas can turn away 25 per cent of customers or more. We ask how operators can track and claw back this lost business

that plays a key part in creating a successful yield management strategy. "There's so much you can improve on and refine in your business by looking at what, when, why and how a customer was turned away," says Lynsey Hughes, spa director at the Mandarin Oriental in Hong Kong. "You get to understand demand and by measuring it you can use solutions, such as changing staff schedules or training, to maximum effect."

But although this sounds pretty straightforward and most operators would agree in theory the importance of minimising turnaways, very few of them actually do this.

The use of waiting lists is becoming standard practice, but is this enough? What other kind of information should be logged when a customer can't be accommodated? And – most importantly – how can these details be used to optimise business?

One challenge is collecting the data in the first place. When staff are busy dealing with customers face to face, it can be difficult to get them to spend time gathering and recording details from phone calls and emails from customers who – in their eyes – are not a priority.

What kind of routines could be put in place to make this an easier and quicker task? Is software the solution? Could a simple tick sheet be the answer, or is manual gathering of turnaways inefficient?

And could all this be avoided if staff had the right customer management training, or were even incentivised enough, to sell a different time slot on another day, or to push a special promotion in order to keep the business? We ask the experts...

Spas aren't really recording turnaway figures. In fact, when we have implemented independent turnaway recordings at spas we consult on, they've been higher than what the operator has told us.

The industry just isn't mature enough in this area and it needs to be honest and recognise that the typical receptionist response is 'no, sorry, we're full'. While most spas do have some sort of waiting list, only about 50 per cent of turnaway customers are being recorded as the rest just say 'OK, I'll look for a treatment somewhere else'.

To ensure all the information is captured accurately, a spa needs to use a computer system – although I'm not sure that any are sophisticated enough at the moment. Ideally the software would have a wait list feature and the ability to automatically text a customer if an appointment is suddenly available. It would also be essential for the system to have a feature for detailing at what hours and on what days guests are being

ANNA BJURSTAM

Director, Raison d'Etre



turned away so that a manager could then look at whether this is in the peak times or due to bad staff scheduling/management.

Part of the issue is also down to poor spa manager training. You need to get managers to focus on collecting figures and analysing how these can be used to increase business and this isn't happening yet.

Revenue management is going to be one of the biggest things coming into the spa industry in the future. This will involve people analysing various sets of data including turnaways. At our own spa in Stockholm [see SB10/2 p54] we're trialling revenue management practices to see what might work elsewhere. At the end of each month we have a five to 10-page management report.

With regard to lost customers, we gather the information manually and make a note

of the day, time, guest type (hotel/day/spa member) and treatment and at the end of the month we'll then look at when our peak times are, how we can drive business during quieter periods and

at other ways of staffing. Because of the turnaway factor in our busy weekend periods we limit each customer to short, one-hour treatments. That way we're keeping more customers and we're also making more money because shorter treatments tend to be more expensive per minute than longer ones.

To avoid losing customers to begin with, however, spas need to manage bookings and the onus is on reception staff training. At the moment, receptionists, are booking takers not makers. They should be asking a guest how they want to feel, how long they'll be staying and suggesting putting something different together on another day if their first choice isn't available.

Start to become booking makers and you'll be able to handle the turnaway factor much better. We've trained receptionists on this in our spa and have seen a 50 per cent drop in turnaways as a result.

To ensure all information is captured accurately, a spa needs to use a computer system – although I'm not sure that there are any sophisticated enough at the moment

Based in Sweden, Raison d'Etre is a spa consultancy and management company which works with hotel partners across the globe. Details: www.raisondetrespas.com

Most spa directors have a gut understanding of how their business operates, but to really know exactly where you can tweak it, you need to look at the turnaway figures in detail.

If we turn down customers because a therapist is unavailable, we look at scheduling. For example, can staff on the same shift cover all types of therapies between them? We keep on top of training – teaching therapists based on the popularity of treatments – to ensure poor training is not a cause.

From analysing turnaways we discovered that we were turning down customers in the evenings (after 5pm), which was a peak time. Originally we had three shift patterns: morning, starting at 9.30am; afternoon, starting at 11.30am; and evening, starting at 2.30pm. But due to demand, we cancelled the mid-shift and put more therapists on in the evening.

When it came to losing customers due to lack of treatment rooms, we also put some simple solutions in place. We're an eight-

LYNSEY HUGHES

Spa director,
Mandarin Oriental Hong Kong



room spa, serving a 501-bed hotel plus external guests. Naturally we're busier from Fridays to Sundays. We noticed this was when we were losing the most business, so we now open an hour earlier at weekends.

We also looked at room configuration. We originally had two double treatment rooms, but thankfully had enough space to change another single room into a double. So, at peak times we try to encourage couples or friends to have treatments together so that we can discourage turnaways. If all else fails, we offer basic massages in hotel bedrooms.

Although we use the SpaSoft software system, which gives a very succinct turnaway report, we actually record turnaway figures manually using a simple tick sheet – you have to make it as easy as possible to collect data. The sheet lists the time slots

and types of treatments on any day of the week and all the receptionist needs to do is circle the relevant entry and write the reason for the turnaway next to it using a T (lack of therapist) or R (no room available). One member of the team adds the numbers to a spreadsheet, which we analyse on a monthly basis.

The emphasis is usually on the receptionist or what we call our 'spa concierge' team to gather turnaway data and they really need to be on the ball. We cover this in their training, but I also think it comes down to encouragement and explaining to them why they need to track this information and how important it is for the success of the business.

All the spas I've worked in have tracked turnaway business and I would encourage all spas, regardless of their size, to do the same, so that positive changes can be made.

Lynsey Hughes has worked in Mandarin Oriental spas for more than 10 years. Details: www.mandarinoriental.com/hongkong

Keeping track of turnaways was our saving grace in the recession. At the time spas were laying off staff. By tracking turnaways, however, I could prove that there was still demand for business and that we needed to keep therapists. By recording the type of treatment we turned down, I could also calculate the amount of money lost and show that it would actually be cost-effective to hire more team members.

I think spas should turn down some business because it shows that they have a good reputation and that they're in demand. However, the turnaway level should be low – no more than 10 per cent on a daily basis.

Our main focus, however, is on not losing business in the first place. If we don't have availability for one service, we'll try to sell another or encourage off-peak bookings – as we're a city spa we can do this more because

LINDSAY MADDEN-NADEAU

Spa director, Amrita Spa, Raffles Dubai



we have regular customers nearby. As people in Dubai always seem to book at the last-minute we also have a waiting list.

It's important to look at turnaway numbers because you can review your customer levels and see when you're busy and what you're getting bookings for.

Our reception staff are responsible for collecting turnaway information manually and the protocol for this is covered in their training. Each evening these numbers are then entered into our corporate report spreadsheets. I've found that the best way to ensure that the details are recorded is to explain to them the importance behind doing it and to get them to take ownership of the task.

All Fairmont Raffles spas have a standard for recording turnaways and I think most other large hotel spa chains would too. However, I think they'd be surprised at how in-depth our system is.

We record the turnaways using a track sheet, which lists all the treatments and times. We note turnaways based on service type and analyse the figures on a daily basis (especially in peak times) to drill down into the reasons why. Was it because the service wasn't available (no therapist) or because we didn't have enough room? We then re-evaluate our operations and look at what we can change to enable us to lower our turnaway levels.

It's difficult to track turnaways in Dubai on a monthly basis as there really isn't much consistency in how people book. We do run into issues of male and female staff availability in turnaways due to the culture here, so we're cautious of that in staff schedules.

Then there's the high demand at the week-ends (Friday to Saturday here). Again, we try to limit this through up-selling other treatments or times or through promotions.

Madden-Nadeau has worked in Fairmont-Raffles spas for 10 years. Details: www.rafles.com

The best way to make sure receptionists record turnaway figures is to explain the importance of these numbers and to get them to take ownership of the task

Even though most operators recognise the importance of avoiding turnaways, few explicitly track or analyse the reasons they occur.

One of the first challenges is defining what constitutes a turnaway, as this depends on the type of spa, and the market segment it operates in. A destination resort, for example, will have a higher level of turnaways, since most people don't book treatments when reserving their holiday so prime times are often full when they arrive. In contrast, urban day spas will have a lower number, as they rarely run above 80 per cent occupancy, except during peak times.

This means taking a general approach to turnaways is often wrong and detailed knowledge of peak times is needed before effective changes can be made.

As more reservations move online and onto mobile devices, the time between when a service is booked and when it's consumed is decreasing, meaning more treatments are booked at the last minute. This makes it even more challenging to schedule optimum staffing and room allocation without the proper tools. If a client calls to book and there's

DANIEL LIZIO-KATZEN

Co-founder and COO, GramercyOne



no availability, spas can try selling them an alternative time or service, but if this isn't possible, the only option may be to put them on a waiting list.

In January, our SpaBooker spa management system will launch a Smart Waitlist with features to track turnaways. This will enable operators to both forecast demand and optimise the management of live turnaways. The module will automatically record details of customer requests that can't be accommodated, saving time for staff.

This 'smart' waitlist will automatically prioritise waiting customers by their value to the business. The system will enable them to be contacted via social media, SMS, email or phone to ensure the highest possible utilisation – and profit – is achieved.

Additionally, it will be possible to examine the previous 30/60/90 days of sales and reveal whether turnaways were caused by under-staffing, to determine optimal staff-

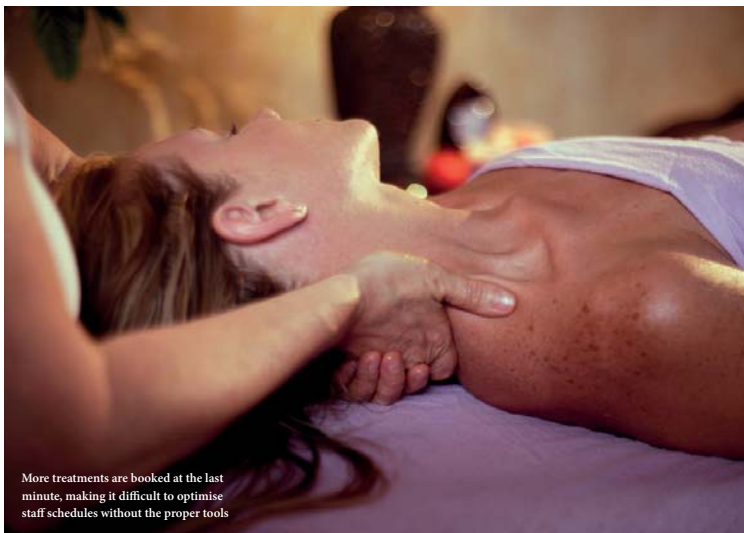
ing levels by time-of-the-day and day-of-the-week.

If a spa has room and staff availability for facials, but customers are requesting massages, then staff can be retrained. If all resources are being utilised, perhaps it's time to adjust the pricing? The exception is that in spas with regular customers, peak times should have turnaways to encourage customers to book early and reverse the trend towards last minute bookings.

The system will highlight which days specific staff or treatments are booked or which have the highest utilisation. Using this information, less tangible things that impact on performance – like therapist popularity – can be better understood.

The goal of every service business is to fully utilise staff and facilities. When you combine the ability to gain insight into why turnaways are happening with the appropriate tools, you gain the ability to allocate resources in a more intelligent manner.

SpaBooker, the online scheduling and business management software, is owned by GramercyOne. Details: www.spa-booker.com



More treatments are booked at the last minute, making it difficult to optimise staff schedules without the proper tools

PHOTO: ISTOCK.COM/SHINOBU CAJUDO

We've managed to run a successful, seven-treatment room spa at Calcot Manor – a 18-bedroom boutique hotel in England – for seven years and as I've been there from day one taking calls and speaking to clients I feel I know my business intimately.

At Calcot our software includes a successful wait list feature but does not run a report allowing us to list reasons why we could not meet that clients' needs. Unfortunately we have to enter our turnaround details into a spreadsheet manually to be useful.

While the information we gather is detailed – we cover the time and date of the appointment, the type of treatment, the demographic of the customer, the reason for not being able to accommodate them and note if there's a request for a specific therapist – collecting and collating it is time consuming and in reality I would like more accuracy.

In June 2009, we acquired another property nearby – Barnsley House Hotel, which has 18 bedrooms – and following refurbishments we relaunched its five-treatment room Garden Spa this April. Now I'm building

CATHY BALL

Spa director,
Calcot Health and Leisure Ltd



Firstly, this has an excellent 'pending' element where requested appointments are held on the system and if a cancellation appears, a text message alert can be sent to notify those on the waiting

list. We are expecting that this will work well in a hotel environment where customers are probably already on-site or nearby.

Secondly, it has a 'missed opportunity' window than can be used to track the amount of business that you have to turn down due to either employee unavailability, a lack of resources or the business being closed. Details of the missed opportunities within a specified date range can then be viewed in a report.

While it's still too early to tell how well this software works we have high hopes that it will help us grow the business by creating more availability at the times and days that it highlights.

Both spas at Calcot Manor and Barnsley House Hotel have been the recipients of trade and consumer awards. Details: www.calcotmanor.co.uk or www.barnsleyhouse.com

up this second business, turning away customers could lead to a completely different scenario: I could lose a client – who may be my highest spending customer – forever. At the moment we never turn down a spa booking until we have tried to create more availability. Consequently, I have a pool of part-time therapists working between Calcot and Barnsley who are happy to be called in to pick up additional treatments.

It's more important in this new business to record and analyse turnaways. I'll be looking for patterns in demand so that I can recruit accordingly – ie ensuring I staff efficiently to make sure I have enough availability at the right times to maximise potential. However, as I'm not at this property so much, I need to rely on reports and manually recording information is not really scientific enough. Therefore, last month, we installed the Millennium programme by Harms Software.

{ we work together }

Mike Indursky & Séan Harrington



The new faces behind Bliss World Holdings explain their ambitions to grow the brand's spas and product ranges globally

In January 2010, Steiner Leisure Ltd acquired Bliss World Holdings (Bliss) – comprising the Bliss and Remède spa facilities and product lines – from Starwood Hotels and Resorts for US\$100m (€72.3m, £63.6m). There are currently 21 Bliss Spas and 10 Remède Spas, the majority operating under a preferred partner agreement with Starwood's W and St Regis hotels, respectively (see SB10/3 p24). Both Bliss and Remède also have professional and retail product lines which are sold through spas, via e-commerce, in boutiques, department and speciality stores and on TV shopping channels.

Steiner, already one of the biggest spa companies globally (see SB04/Q2 p58), operates 130 spas on its cruise ships, plus 70 Mandara, four Chavana and two-branded Elemis spa facilities. Elemis, Steiner's principle product line, turned over £65m (US\$102.2m, €73.9m) in 2010 – its best year to date.

This March, Mike Indursky was appointed president of Bliss. Indursky has 20 years of experience in a broad range of aspects in the personal care industry and most recently worked for Burt's Bees Inc as chief marketing and strategic officer. Séan Harrington, one of the founders of Elemis, took on the responsibility for Bliss in the UK in June 2010.

So, just what do their posts involve, how are they integrating the two businesses and what exciting things can we expect from them in the future?



Indursky (left) and Harrington (right) are the driving forces behind Bliss' rollout outside the US

How did the opportunity to join Bliss present itself?

Mike Indursky (MI): It was wonderfully serendipitous – I had just finished my contract at Burt's Bees in North Carolina and wanted to go back to New York where I grew up (which is where Bliss is based). I wanted to stay in the beauty business, but work in a fast-moving environment where I could use my entrepreneurial and creative skills and really roll my sleeves up. I got a call from Bliss and the role met my every criteria.

Not long after I joined, it was recognised that we needed someone to head up the UK side of the business. While Bliss was strong in the US, in the UK it wasn't performing so well, despite high demand for the product. We needed to reinforce the infrastructure. Séan [Harrington] is such a powerful person in the UK and Elemis has such a strong infrastructure there that it made sense to use him and his resources.

What are your responsibilities?

MI: To manage the company towards long-term profitable growth; and to set a vision and put together an organisational structure to help it realise its full potential.

Séan Harrington (SH): I'm here to run Bliss in the UK. Over the last 20 years, I've built up a team and infrastructure to deliver Elemis in the UK and worldwide. I'll be using my team, network and contacts in the UK to now promote Bliss. The aim is to also leverage Elemis distributors and accounts internationally for Bliss where appropriate.

How would you describe the Bliss brand?

SH: Bliss isn't a new brand; it was created in the mid-90s by Marcia Kilgore, who is a genius in the world of marketing (see SB06/3 p103). She brought great energy to the brand and came up with something that has a fun, unique edge.



"When we looked at the Bliss and Elemis client databases side by side, there was only a 3 per cent crossover [yet the brands have the same channels of distribution] which I think is very exciting"



So far, Bliss products and treatments have only been sold in Bliss-branded spas, but that's about to change

MI: Bliss has a fun, witty brand image and we think of it as being the fountain of happiness. There are tonnes of brands to make you look beautiful, but only Bliss can make you happy. For example, you can eat brownies in the spa lounge and receive complimentary product samples. Guests feel empowered after our results-driven treatments, administered by expert technicians who specialise in individual areas such as facials or nails.

Bliss targets a younger audience, however, the clientele isn't a demographic, it's a psychographic – they're people who first and foremost believe that they look and feel their best after they've had a spa treatment.

Which companies does Bliss compete with?

MI: In the US, Bliss is sold in speciality stores such as Sephora and I would say it has an average to higher price point. A 2oz (57ml) Triple Oxygen+C Energizing Cream goes

for US\$54 (€39, £34) and Clinique would be cheaper than that, while Lancôme would be more. When it comes to spa facilities, we feel it's in a unique category.

SH: In the UK, competitors include Philosophy, REN, Liz Earle, Origins and Molton Brown. Yet none of these brands are actually as focused on the spa business and facilities as Bliss.

Will bliss take away business from Elemis?

MI: No, because the positioning of the brands are completely different.

SH: Elemis has an older client base, aged 35- to 70-plus, and has about a 25 per cent higher price point. It's also more experience driven, while Bliss treatments are usually shorter and focus on maintenance services. In fact, when we looked at the two client databases together, there was only a 3 per cent crossover, which I think is very exciting.

What are your plans for Remède?

MI: Remède is very different from both Elemis and Bliss. It's a five-star skincare line which incorporates the very best ingredients and technology and is used at only the top spas worldwide. It's for very discriminating consumers, aged 40 and over, who have incredibly high standards and are willing to pay a premium for this – Remède's Alchemy Premium Night Cream costs US\$165 (€119, £105) for a 2oz (57ml) pot. Its distribution is more exclusive, for example, it's only sold in high-end department stores. Unfortunately, Remède has been overshadowed by Bliss, but it's still a very important brand to us.

How has Bliss been integrated into the Steiner business so far?

MI: We had never offered Bliss services outside of a Bliss Spa, so when Steiner bought us, one of the first things to do was to introduce our services and products onto its cruise ►

► ship spas. That was just business waiting to happen and we did that pretty much right away – we're now on 95 ships and growing. SH: Interestingly, Elemis sales haven't declined on cruise ships since Bliss came on board, so it's only been incremental.

MI: We've also integrated the e-commerce sides of both the Bliss and Elemis businesses. In addition, Bliss Spas in the US and UK now retail a selection of Elemis products and offer two of its treatments. We're focusing on how Elemis spas might further incorporate Bliss and will be looking into possibilities in the Mandara and Chavana spas.

How else will you gain efficiency in the group?

MI: Bliss has already been moved to Steiner's warehouses in the US and Elemis' warehouses in the UK. We'll also look to share distributors where appropriate. Next, we'll be looking at other ways to make the supply chain more efficient, especially in the purchasing of ingredients, laboratories and research and development.

SH: It's inevitable that we'll share best practice such as the formulation of products and ideas gathered from raw material.

MI: Bliss has a hard core expertise in the US and we want to use this to make Elemis more successful there. There's a big difference being 'in the market' and 'of the market'. To sell into another country you need to be of the market – you need to understand the culture, consumers and how to talk to them – Bliss can do that for Elemis in the US.

What challenges have you faced with integration?

MI: It's all happened very quickly and quite seamlessly actually. Moving fast has been key and we – me, Sean and Leonard [Fluxman, president and CEO of Steiner] – have worked closely together as Steiner employees. Yet we've also been able to wear our brand hats without being territorial and that takes a certain level of maturity. It also helped to have a strong team in place, although I have already narrowed down my direct reports from 20 to eight. Those who still report into me include the head of sales, brand development, e-commerce, HR, our CFO and our two heads of spa operations (one focusing on the east and the other on the west).

What new territories will Bliss be targeting?

MI: An overwhelming majority of our business is in the US at the moment and our main strategy is to grow internationally. We have constant requests from distributors all over the world. It's great to have so much choice, but we need to be very deliberate about our expansion.

SH: The UK is obviously a key market for Bliss: clients are crying out for something different. Although it was already sold here, the business was managed directly from New York and was still at entry level in the UK and generating about £5m (US\$7.9m, €1.1m). Now it has a strong UK base, we'll look to double the revenue by tapping into Elemis' 1,000-plus doors of spa distribution.

MI: Bliss has also just launched in Australia in 50 of its Myres department stores. Some Asian and Eastern European countries are very appealing too.

Our strategy is to look at markets in terms of size, barriers to entry and regulatory issues. We'll also consider countries where Bliss will resonate best – such as English-speaking nations where customers can relate to its quirky American image or Asian countries, especially Japan, where America has a strong appeal. For every new territory, it's important to have a supply chain that can support the growth and to have some kind of Bliss Spa service or presence.

What's Bliss' best selling channel?

MI: Our spa business, where we sell treatments and products, is the strongest – it generates 50 per cent of our turnover.

How will you improve the Bliss spa business?

MI: Bliss is the preferred third party spa partner for Starwood's W hotels, we're in 17 of them, and this model works perfectly for us. Previously, however, we've been quite selective over which W hotels we go into but as we do so well in them our aim is to launch in as many new future W hotels as possible – although this is obviously dependent on W's project pipeline. We would not open in any other hotels as we're exclusive to W. However, there is the opportunity to develop more standalone Bliss Spas and we're working with our distributors on this.



Bliss' funky image will go down well in English-speaking countries

PERSONAL FILES

	MIKE INDURSKY	SÉAN HARRINGTON
Favourite book	<i>The Fountainhead</i> , by Ayn Rand	<i>The New Thing: A Silicon Valley Story</i> , by Michael Lewis
Favourite film	<i>Breaker Morant</i>	<i>The Sting</i>
Food you love	Sushi	Anything Asian
How you relax	Play the guitar very loudly or exercise outdoors	Sail, ski and play tennis
Favourite non-Steiner spa	The Umstead Hotel & Spa in North Carolina, US	The spa at the Four Seasons in Chiang Mai, Thailand
Preferred treatment	A great, long (75-minute) massage	One where you can fit as many services as possible into 60 minutes – I don't have the patience for anything longer!
Best advice	Create your own future as no one else will do that for you	It's sounds corny, but it's 'live the dream'
Most admire	Ayn Rand, Teddy Roosevelt and Frank Zappa – people who have done whatever it takes to realise their vision	Steve Jobs, the founder of Apple



Bliss' spa business – selling treatments and products – accounts for 50 per cent of its turnover

SH: The really big opportunity is in selling Bliss products and treatments in other spas – at the moment this is only done via Bliss branded facilities. Elemis is certainly doing big business this way.

MI: It's still early days on this, however, as we're only just starting to think about who we want to partner with and we need to be very careful about this to ensure we protect our brand equity.

What are your plans for selling bliss online and on TV?

MI: The Bliss website is very sales-orientated at the moment, so we want to develop the online experience for our customers and create more of a relationship with them by offering beauty advice and giving them access to the expertise of our technicians.

As for TV sales, QVC is working really well for Bliss in the US and we want to launch on other QVC channels worldwide.

SH: Elemis is the highest performing beauty brand on QVC in the UK – we sell about £12m (US\$18.9m, €13.6m) worth of products annually – we have a fantastic team of people managing this side of the business which Bliss will be able to take advantage of.

MI: Direct response television is another path we're considering.

How will you grow your retail business in department stores?

MI: Bliss retails in around 90 department stores globally. We're in the high-end stores,



Bliss Spa at W Doha

such as Sephora and Blue Mercury in the US and Harrods and Harvey Nichols in the UK. We mainly operate within a self-service environment, which cuts out the cost of beauty advisors. However, it does mean that our merchandising and point-of-sale material must be exceptional and we're currently reworking this.

Of course, we plan to increase our number of retail outlets in department stores too, but we'll do this at the right pace to ensure that we pick the right partners.

SH: Elemis is sold in 170 department stores globally, so there's an opportunity for commercial deals with Bliss there. In late 2010, it will launch a flagship Bliss retail area in

Debenham's [a key account for Elemis] in London and Glasgow, UK, with a rollout of self-select areas across the country to follow.

In retail, Elemis' sales are therapist-driven and the focus is on bringing the spa experience to the counter. We think this is something that Bliss can learn from.

What new products can we expect from Bliss?

MI: When Marcia set up Bliss, it was her belief that the spas and website would act as curators in introducing customers to third-party product and equipment brands that they might not see otherwise. We will still continue with this, as it's an important part of our business. However, where's there an opportunity to introduce more Bliss-branded products, we will. We're now reviewing what personal care and wellbeing categories Bliss should be developing products in.

What is your goal over the next 12 months?

MI: To strengthen Bliss's core business – across spas, department stores, online and on television – by making sure that we have the same look, feel and brand message in everything that we do. I would also like to ensure that we have the right infrastructure internally which will enable us to do this. This will then set us up for big growth in the long-term. This company is going to have such an amazing run and I'm so excited to be a part of it. ●

Spa at the Del Hotel del Coronado



This spa is hailed as the jewel in the crown of San Diego wellness facilities, but our mystery shopper felt the only real gem was her therapist

ANNI HOOD • GLOBAL SPA AND WELLNESS SPECIALIST

The Hotel del Coronado is a stunning piece of architecture with interiors that take you seamlessly back in time. Located at the ocean's edge, this now 757-bedroom property first opened in 1888 and attracts as many day visitors as it does overnight guests.

In addition to the spellbinding location, the hotel boasts a wealth of retail therapy – selling everything from clothes and chocolates to books and homeware items – and is clearly a mammoth hit with the locals.

The hotel launched its new Spa at The Del in January 2007 and only a year after opening it was named one of the top 20 hotel spas of the world by *Travel + Leisure* magazine. The spa covers 12,500 sq ft (1,160sq m) and was designed by Hirsch Bedner Associates.

THE VISIT

The offer

Located on the beachfront, the Spa at the Del has 21 treatment rooms and offers day packages, massages, facials, scrubs and wraps. Shorter, 25-minute treatments for teens are also available. The product houses are Babor and Epicuren. Other facilities include a hair salon, retail/reception area, fitness centre and outdoor infinity pool and lounge, as well as gender specific areas comprising a changing room, relaxation area, whirlpool, sauna and steamroom.

Booking

The initial booking experience was excellent. The person who took my call was very

thorough, knowledgeable and efficient. I explained I wanted to bring a friend who wouldn't be having a treatment and she was expansive about the use of the facilities, specific about cost and nothing was a problem.

Access

The spa could only be accessed through the resort: not a grand entrance. And car parking was tricky – we could only get a ticket from the resort and this was refundable against our bookings. However, if you go over the three hour limit (very easy on a spa day) there is a charge is US\$35 (£25, £22). This was not pointed out to us until leaving and considering that I had spent over US\$400 (£285, £254) on products, it did sour the experience somewhat.

Disabled access

Disabled access was good and I spotted a few wheelchairs. Most of the spa itself was flat, however, some parts – especially in the male area – could have proved problematic.

Design & layout

I was surprised at the design – I was expecting something to match the stunning grandeur of the property but the spa fell short of that. The design was based on a colonial theme, but it looked dated and flat.

Entering the spa, you're immediately immersed in the retail offering with the reception desk at the rear, but there was no lounge or waiting space.

There was no cooling experience in the sauna/steamroom area and I wondered whether space was the issue, but an ice fountain doesn't take up much room. Being



Unfortunately, women had to use the men's spa area on the day we visited

VITAL STATISTICS

Address: 1500 Orange Avenue
Coronado, CA 92118

Prices: 50-minute massages range from US\$155-165 (£111-118, £98-105); 50-minute facials are from US\$160-165 (£114-118, £101-105); day packages, which last for three and a half hours, cost US\$490 (£349, £311) each. Haircuts in the Yamaguchi Salon start at US\$65 (£46, £41)

Times: Friday and Saturday, 10am-7pm; Sunday to Wednesday, 10am-6pm; closed Tuesday

To book: +1 619-522-8100



The spa's outside lounge area (above) was a highlight; our mystery shopper found the colonial décor to be a bit flat (right)

unable to alternate between hot and cold is a thumbs down for a die-hard spa-goer.

The infinity pool and outside lounge area, with a fire pit located centrally and views of the ocean, was the nicest part of the facility by far. Yet it wasn't at all private as only a sheet glass divided guests from the main thoroughfare immediately adjacent. This must have been a difficult choice between privacy and view, clearly the view won and admittedly it is mesmerising watching the waves break on the shore.

Cleanliness

Cleanliness could have been better. Although the vanity area was clean and well stocked, there were several house-keeping issues. The dispensing of towels and slippers was done from a cupboard that was wide open and incredibly messy. There were no towel bins, which meant that guests discarded large towels and face cloths on the ground, chairs or beside the whirlpool.

In addition, one of the attendants was also spotted throwing half consumed cups of water into the whirlpool – oh dear.

The staff

The spa team members that I met were lovely. They were informative, welcoming and knowledgeable. My therapist was particularly amazing – her name was Cori – be sure to ask for her if you're visiting.



The experience

Unfortunately, on the day of my visit there were technical problems in the ladies' spa area, so we had to use the male area (euww). The sight of the urinals, although partially covered, isn't the best image to begin a spa experience! Gents were changing in the fitness facility and clearly there wasn't any waiting space for them as they had to linger by reception looking uncomfortable.

We were shown to the changing area and given a tour of the facilities. The young lady asked for our shoe sizes and gave us

some plastic slippers that were comfortable and clean. No refreshments were offered. We could help ourselves to water but there was no tea or juice, even to buy. Apples and oranges were available in the waiting area.

The relaxation room was very masculine (obviously) and functional. Chairs were lined up along the perimeter of the wall with a water cooler in a corner. I did have a peek at the usual ladies side – although a little larger, it still didn't have much atmosphere.

We relaxed in the whirlpool and steam-rooms and spent the biggest chunk of time in the outside area with the fabulous pool, fire pit and wonderfully comfortable loungers. ►

WHAT'S THE SCORE?

Ease of booking	10
Facilities	5
Cleanliness/maintenance	4
Staff	9
Experience/treatment	10
Value for money	6
Overall experience	6

I ventured back inside to the 'waiting area' for my therapist to collect me – difficult to refer to it as anything else as it was brightly lit, had no music and everyone was speaking normally. There were lots of groups on that particular day. The therapists appeared at a central doorway and called out the name of their guest. This felt like I was on a conveyor belt, but it's not easy to imagine how else they would operate with the volume of guests.

Cori collected me and we exchanged pleasantries en-route to the treatment room. I had originally opted for a hot stone therapy treatment, but having overdone it on exercise (very easy in California!), I needed a sports massage integrated with the hot stones. Cori was already aware of this and it wasn't an issue – she said she would tailor the treatment to whatever I liked.

Although I had signed a disclaimer upon arrival, no consultation was carried out. I asked Cori, who said that consultations were done verbally and that everyone knew what to ask. I questioned how they would fare on any litigation issues and she said the disclaimer took care of that. This amazed me –



The retail area is in a great position in front of reception (above), yet guests are not sold to at all

particularly in the US. One thing was for sure – she knew what to ask and responded with an assured expertise to any questions I had.

As a therapist she was exceptional. I learned that one of her passions is crystal healing and crystal energy. Not only did I receive a fantastic massage, I also had the advantage of her considerable gift of reading and working with my energy.

The design of the treatment room was poor. All equipment was on display. From the hot stone bath and treatment towel heater to the products, all of which were positioned on a side bench. However, I still left the room feeling fabulous and it was 100 per cent down to the expertise and pure loveliness of Cori.

I also liked what Cori had to say about Hotel del Coronado. She has worked there for 20 years and talked about how well they

treated their staff, how much she loved working there and how much she adored meeting people from all over the world. I thought wow, here's an absolute star of an employee and they obviously know it – great to see.

Retail is my hobby horse. I love it from both sides of the counter but sadly the Spa at The Del scored a big fat zero. No recommendations, suggestions, engagement or even offers of help as I was looking around the retail area. Fortunately for them I bought a few things anyway but if that is the consistent standard of retailing, they must be missing out on a small fortune.

RIGHT TO REPLY

Nancy King, spa director, Hotel del Coronado

We are happy to see that the shopper enjoyed her treatment and feel that it is indicative of the quality of service we provide. Unfortunately, during the week of her visit, we were upgrading. As the operational issues she encountered have been resolved, we're confident that spa guests are now enjoying an exceptional experience. Although she was not particularly fond of the spa's aesthetics, many of our guests enjoy its classic charm. In designing the spa, care was taken to preserve the structural and aesthetic integrity of this National Historic Landmark, and to create a space that allows modern conveniences to blend with Victorian style. With passionate and professional therapists, a spectacular beachfront relaxation terrace featuring a vanishing-edge pool and unique ocean-inspired treatments, it's easy to see why it has been voted one of the top 20 hotel spas in the world by *Travel + Leisure*.



Value for money

The treatment was very expensive and not good value for money and for the cost of the day packages, the scope of facilities in the relaxation and wet areas were limited.

Summary

Overall, I thought my experience was very 'mass-clusive' – exclusive, but for the masses – it had great PR, but it's not somewhere you'd go for a quiet treat. The service was not five-star and the design disappointed me. There were some operational issues that could have been fixed very easily, alongside some commercial opportunities that simply were not being explored. Having said that, if every therapist is as good as Cori they're going to win every time. ●

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MODERN TWIST

The new Rockliffe Hall hotel, a former 18th century English estate, is steeped in history but features a state of the art spa

Boasting landscaped gardens, rare trees and flanked by the River Tees, the 375-acre (152-hectare) grounds of Rockliffe Hall in the north of England are stunning.

The hall, formerly an 18th century stately home and estate, reopened in November 2009 as a multi-layered business featuring a 61-bedroom hotel, an 18-hole golf course and a number of restaurants including the Michelin-starred Orangery. The jewel in the crown, however, is a 50,000sq ft (4,645sq m) spa and health centre – one of the largest UK spa openings in the past year.

“The strength of Rockliffe Hall is really in the sum of parts,” says managing director Nick Holmes. “Although any of the elements could be independent profit centres, our primary objective is to market ourselves

as a destination.” And one particular selling point of this ‘destination’ is its history.

A sporting chance

The original plans for Rockliffe Hall date back to 1774. It was a private home for many years, with residents including renowned botanists the Backhouses, and from 1950 was also a hospital and community centre.

In 1996, the estate was acquired by Gibson O'Neill, a company which Steve Gibson – chairman of local football club Middlesbrough FC – has a 75 per cent share in. Gibson, a self-made millionaire, is a local hero: he's saved the club from liquidation, built it a new stadium and in 1998 he opened a £7m (US\$11.2m, €8m) training and sports science academy in the grounds of Rockliffe Hall, where the team still practises today.

While the hall sadly stood derelict for more than a decade, Holmes says “it was always part of Steve's plan to eventually do something special with it.”

Quintessentially English

It took more than five years and £60m (US\$96m, €68.2m) to fully refurbish the former stately home. The architects Browne Smith Baker and interior designers RTR Design kept much of the building's Victorian and gothic architecture, but added modern touches. A standout feature of the spa, for example, is an indoor swimming pool which is saturated in colourful lights from stained glass windows, sourced from a disused chapel on-site.

Many areas of the operation also have a quintessential English feel to them – from afternoon tea and traditional Sunday lunch to clay pigeon shooting and rambling over the idyllic grounds. This extends to the spa where six ‘butlers’ are always on hand to ensure that guests have all the guidance and information they need, especially in the hydrotherapy area and thermal suite where they give advice on how to get the maximum benefits from the five different heat experiences that are on offer.

Meanwhile, the spa's signature therapies have drawn inspiration from Alfred Backhouse, the estate's 18th century owner who was an ardent horticulturalist. Scents from his favourite plants are used in the Sweet Pea and Rose Facial, while the Horse Chestnut and Pine Scrub Wrap was inspired by the woods he commissioned. The therapies, which were created in conjunction with the UK organic product company ila, are a unique selling point and use ingredients harvested from the grounds.



ila has picked plants on-site to be used in the spa's signature therapies

Rockliffe Hall hotel & spa by numbers

- Bed and breakfast prices at the hotel start at £270 (US\$431, €307) based on two people sharing. There is no extra charge for the chromotherapy rooms.
- Day spa membership costs £95 (US\$152, €108) and includes a lifestyle analysis, regular health checks, access to all spa and fitness facilities and a 10 per cent discount on all products, treatments and food/drinks in the resort
- Residential spa programmes can last two to three days. The Time to Dream Sleep programme with Doctor Meadows costs £395 (US\$631, €449).
- The 60-minute Sweet Pea and Rose Facial costs £80 (US\$128, €91)
- Forty people work at the spa including 12 full-time therapists



21st century wellness

For all its history, however, Rockliffe Hall is also home to a contemporary spa, which accounted for £12m (US\$19.2m, €13.6m) of the total budget. The two-storey facility is part of a brand new extension, which also comprises 33 new bedrooms.

The spa has a bright, airy reception and retail area on the ground floor, plus the 20m pool, an 11m hydropool and the thermal suite – all equipped by Taylor Pools. There's also a substantial fitness provision including a 50-station Technogym gym, two studios and the UK's first Nordic walking programme at a resort.

On the next level there are 13 treatment rooms, including a couple's suite. A mud Rasul, salt suite, relaxation room and spa bistro complete the offer.

In spite of its considerable size, the spa has an intimate feel – a palette of rich colours such as brown, burgundy and violet, combined with metallic tile finishes give a feeling of being cocooned.

The driving force behind the spa has been Nick's wife Liz Holmes. Together the pair have brought much passion to the project and 50 year's experience in hospitality and fitness. To create the spa at Rockliffe, Liz worked with UK spa consultant Lisa Knowles from The Spa Set. "The aim of the spa is to surprise guests," she says. "We believe that it will be the standard bearer for spas, not only in north England, but across the UK."

An interesting touch is six chromatherapy bedroom suites in the new extension. The Holmes' are advocates of colour therapy and these suites consist of light panels on either side of the bed, where guests can choose a particular colour such as a soothing violet or energising red, or select a pre-programmed sequence of different colours to suit their

Spa butlers offer advice on using the thermal suite and hydropool (above); the big spa feels intimate thanks to a rich palette of colours (right)

mood. In addition, they're currently working with Dr Guy Meadows, a UK sleep specialist, to create a new spa residential programme to combat insomnia. This will include an overnight stay in one of the suites, the relaxing *ila Dreamtime* treatment, and a lifestyle analysis, plus meditation. This will be just one of a new range of packages to cater for guests wishing to focus purely on wellbeing.

Liz says: "We plan to develop our wellness centre concept and to excel in any aspect that people come to our spa for – weight-loss, anti-ageing, stress management or to simply relax. I have a high-level of expectation of my team in delivering this."

A passion for success

Currently, 60 per cent of business at Rockliffe Hall comes from guests visiting for leisure purposes, with corporate customers making up the rest. All come from the UK, putting it in direct competition with other high-end resort spas such as those at Seaham Hall and Titanic Mill, both within a 90-minute drive. But Liz has every conviction that they can outperform them in terms of standards and services.



In terms of spa usage, day spa guests account for 60 per cent of treatment revenue compared to 40 per cent from hotel guests. This is partly due to a successful spa membership scheme – there are already 412 members and the limit is 600.

While it may be too early to give accurate performance figures, the Holmes are slowly building up business – in July the treatment room occupancy was 90 per cent and they're using this as a future benchmark. They expect to see a return on investment in three to five years and certainly have the passion to make the spa a success.

Nick says: "I genuinely love the team spirit here and there really aren't many places like this being created at the moment." Liz concurs: "It has been so exciting to be a part of creating something so special. I couldn't ask for anything more." ●

MORE TO Montenegro

In the concluding part of our focus on the Balkans, we reveal the potential for spa development in Montenegro

TERRY STEVENS • MANAGING DIRECTOR • STEVENS & ASSOCIATES

Covering just under 14,000sq km (5,405sq miles), Montenegro has a small population of 650,000. Yet it attracts up to one million tourists a year. Located in south-east Europe, with an Adriatic coastline stretching nearly 300km (185 miles), it has traditionally been a highly seasonal summer beach destination with Serbian and Kosovan families. It is now keen to make the transition to a more high value, international tourism market. Consequently, a focus on sustainable tourism – with a strong emphasis on wellness – is emerging as the way forward in both its coastal and inland mountain resorts.

An independent state since 2005, Montenegro claimed its new constitution in October 2007. Three years on, and the government has submitted its application for EU membership, its economy has stabilised and GDP has grown by 18 per cent per annum in recent years (although this is still one of the lowest in Europe). Tourism now accounts for 21 per cent of national GDP – equating to €480m (US\$662.1m, £421.1m) a year – and is increasingly seen as a major economic activity. The latest statistics from the Ministry of Tourism show that the country receives over 1 million tourists annually and this is set to grow further over the next 10 years, albeit slowing down in the face of the recession. Net foreign direct investment has been close to €600m (US\$827.2m, £526.3m) per annum, two thirds of which have been in real estate including resort and spa projects.

OPERATOR OPPORTUNITIES

The transition towards higher value wellness tourism has already resulted in two major developments. In December 2007, the Hotel Splendid in Becici – one of the country's main coastal resorts which is owned by the STARS Hotel Group – opened an €8m (US\$11m, £7m) spa. The 3,000sq m (32,292sq ft) Splendid Spa is linked to 13 wellness apartments with whirlpools. Further south, on the island of Sveti Stefan, Amanresorts (see SB10/2 p24) has redeveloped a luxury resort Villa Milocer, a former royal residence. Initially an eight-suite retreat, phase two will include 47 more suites and the creation of a fully-equipped, signature Aman Spa is due for completion in 2011.

Elsewhere, opportunities for international operators exist in the form of two tourism schemes – on Ada Bojana Island and in Valdano Bay – that were put up for tender in 2008 by the country's Ministry of Tourism. So far, the most significant investment interests have come from Norway, Austria, Russia and Slovenia.

Ada Bojana, an island surrounded by the Bojana River, is on the southern coast of Montenegro and because of the site's ecologically rich, beautiful environment and secluded private setting, the government foresees the configuration and operation of an exclusive four- to five-star hotel/resort/village complex.

The vision is to create a resort that will reflect contemporary Montenegrin architecture and include up to 2,500 hotel bedrooms and recreational facilities and services. The government anticipates that the development, once opened, will be listed in the international hospitality industry as a top nature resort.



The island of Sveti Stefan (above) features an Amanresort development





Valdanos, a former military vacation camp in Valdanos Bay, is also situated on the southern coast. The total area of the complex in this tender is nearly 1sq mile (2.6sq km) and the space for facilities is 8,767sq m (94,367sq ft). The conceptual framework includes a wellness resort with luxury tourism accommodation and protection of the coastal and ecological area. Montenegro is primarily interested in public-private partnership projects.

Although Montenegro is a relatively small country, the quality and diversity of its natural and anthropological offerings makes it one of the most attractive regions in the Mediterranean and a region that attracts holiday makers in search of wellness, sea and sand and winter sports experiences. Given this, it's not surprising that the Montenegro's government has highlighted tourism as a strategic sector for its economic development. According to external estimations, the coun-

The €8m Splendid Spa (above) opened in December 2007. Meanwhile, opportunities for international operators exist in the form of two tourism schemes put up for tender by the Ministry of Tourism in 2008

try could generate revenues of around €800m (US\$1.1bn, £701.7m) from tourism over the next 15 years, helped along no doubt by the development of luxury resort and wellness destinations.

The immediate tourism demand will come from summer leisure visitors seeking the republic's relatively underdeveloped coastline. However, its heritage, culture and increasingly its wellness product will also command global attention. Montenegro's desire to become the primary destination for health and wellness in the Mediterranean region will be challenging to achieve, but remains a future goal. ●



KEPT IN SUSPENSE

Whoever would have thought that just hanging around could be so good for your health?

OK, fair to say there's rather more to suspension training than that, as I discovered for myself when I tried out some of the offerings currently on the market – it's actually a pretty tough workout. But it's certainly the hanging aspect that injects the novelty factor into the sessions, as well as opening the door to a wide variety of unusual exercises and movements that simply wouldn't be possible on traditional gym equipment.

All in all, it's easy to see how the popularity of this training method is growing so rapidly: it's different, it's fun and, if my aching muscles the following day were anything to go by, it also yields results. So, what systems are available and what do spa and fitness operators thinking of signing up need to consider?

With suspension training taking the health and fitness sector by storm, we outline the benefits of this technique and try out some of the classes currently available

STRAP SYSTEMS

The simplest, cheapest and most common form of suspension training are the strap-based systems – where straps are fixed to an anchor, but can move freely to challenge the user to move their bodyweight around an unstable point.

One of the most well-known brands is TRX, which launched in 2005 and is available worldwide. Wendy de Knoop, who focuses on sales and marketing for Escape Fitness, the European distributors says: "The TRX® Suspension Trainer" is a highly portable performance training tool that leverages gravity and the user's bodyweight to enable hundreds of exercises for every fitness

THE LOW-DOWN: TRX

SPACE REQUIRED: Quick to set up and take down, the TRX system can be attached to any secure overhead anchoring point (wall, tennis court fence, beam, post etc), so no permanent training area is required. However, freestanding frames designed to facilitate group training of up to 24 people are available.
COST: £150 (US\$236, €169) per TRX.
Door anchors cost £23 (US\$36, €26) each; frames start at £990 (US\$1,550, €1,100).
TRAINING: One-day course delivered by a TRX master trainer. A course group training sessions is also available.

goal, simultaneously building strength, balance, flexibility and core stability. That's all you need: the TRX and your own body.

"In real life, our bodies move to the side, backwards, forwards and diagonally. Shouldn't we train the same way? Unlike traditional weight training that tends to be linear and follow one plane of movement, suspension training encourages multi-planar training that mimics real life movement. This will bring a muscular balance to your body, increasing performance and preventing injuries."

In the US, TRX has not only been installed in health clubs but is also being used by the military and professional athletes. Yet suspension training caters for all levels of fitness even deconditioned users, those seeking rehabilitation or less-able bodied people. It can also be used in one-to-one or small group training sessions and circuit training classes. De Knoop adds: "It also attracts men who have traditionally shunned group fitness classes. Clubs are reporting almost 50/50 men and women in their TRX classes.



TRX is one of the best known strap systems



AntiGravity Yoga allows even beginners to undertake advanced inversions safely

ANTIgravity YOGA

AntiGravity®, an acrobatic troupe specialising in aerial arts, was founded in New York in 1990 by Christopher Harrison. A former Broadway dancer and world-class competitive gymnastics specialist, Harrison launched AntiGravity Yoga in 2008. The programme, for the everyday exercise, is based on yoga, but also combines modified acrobatic and elements of dance, pilates and callisthenics – all performed on the AntiGravity Hammock.

Connected from two overhead points, the hammock acts as a soft trapeze, supporting participants in movements ranging from simple suspension techniques through to

advanced inverted poses. The benefits are said to be wide-ranging, from the relief of compressed joints and the spine to improved body awareness and overall agility. Having tried out AntiGravity Yoga for myself – at the Aspria Berlin hotel, club, spa and sports centre in Berlin, Germany – I can also vouch for its ability to deliver a tough upper body and core workout, to get the heart pumping, and to facilitate deep stretches. The support of the hammock allows even beginners to hold challenging yoga postures for longer, and in the correct alignment, leading to a real sense of achievement – not to mention great results. Other exercises range from pull-ups to planks, handstands to hamstring stretches, and swinging while seated in the hammock to simply relaxing in a cocoon at the end of the session.

Best of all, the use of the hammock makes the whole class great fun – I honestly forgot how hard I was working. By the time we left the studio I was sweating, with tired muscles, but felt energised and had a huge grin on my face – probably the best class I've ever done.

Marika Molnar, president of West Dance Physical Therapy and director of physical

AntiGravity Yoga is probably the best class I've ever done – the use of the hammock makes it great fun and I honestly forgot how hard I was working

THE LOW-DOWN: ANTIYOGA® GRAVITY

SPACE REQUIRED: Concrete ceiling required, with a 4m x 2m area needed for each hammock.
COST: €400 (US\$560, £356) per hammock, plus around €30 (US\$42, £27) per ceiling attachment. In addition, an annual licence fee must be paid. Costs provided by Aspria Berlin.
TRAINING: €1,000 (US\$1,400, £890) per instructor for two weekends of training.
DISTRIBUTION: AntiGravity Yoga is currently available in the US, Canada, certain parts of Europe and is expected in the UK soon.



Movements require muscular balance

therapy services to the NYC Ballet, agrees: "AntiGravity Yoga is revolutionary. The technique gives a low-impact cardiovascular workout while strengthening the musculoskeletal system. I found it challenging for my brain and body to move in 3D, with endless possibilities of positions and shapes."



The JUKARI Fit to Fly programme was developed by Reebok and Cirque du Soleil in 2008

► JUKARI FIT TO FLY

In 2008, Reebok and Cirque du Soleil came together in a new partnership – their aim: to make fitness fun again for women. “The task was to create the ‘smile while you’re sweating’ workout,” says Leslie Calvagne, training director at Reebok.

The result was JUKARI Fit to Fly™. A whole body workout that delivers a combination of cardio, strength, balance and core training, JUKARI is designed to be accessible to all women regardless of fitness levels. It uses a specially designed piece of equipment, the FlySet, which resembles a circus trapeze. With a bar that can be varied in height, the FlySet is suspended from a 360° swivel point in the ceiling and allows for a series of moves that are said to strengthen

and lengthen the body while creating the sensation of flying.

Lyn Heward, creative director of the Reebok-Cirque du Soleil programme, explains: “From day one, we committed to making sure every move would be inspired by real moves Cirque du Soleil artists do. Anyone taking the Fit to Fly class must leave it feeling they’ve experienced something different.”

The Reebok Sports Club in London was the first site in the UK to offer JUKARI. “I think it’s an amazing exercise routine and it’s been well received,” says managing director Ian Mahoney. “It’s different and has two key ingredients that, in my book, give it an excellent chance of becoming a long-term established feature of our timetable – namely, it’s both fun and challenging.”

I went along to try out the class for myself and it certainly was both of those things. The upper body was taxed through pull-ups, legs worked through side-kicks and squats with the FlySet used almost like a ballet barre, and the bar removed and replaced with foot stirrups for extra-challenging planks, press-ups and shoulder bridges. I certainly thought it was more fun than your average exercise

THE LOW-DOWN: JUKARI FIT TO FLY™

SPACE REQUIRED: Specific measurements are not supplied but, says Mahoney: “You need a minimum height and enough space to make participant numbers worthwhile.”

COST: Costs were not provided by Reebok. However, says Mahoney: “It’s not something you can enter into lightly. There are training costs, licence fees and set-up costs.”

TRAINING: Originally delivered in North America, but training camps are now being set up in Europe.

Although the session included a small amount of jumping and spinning from the bar, I never felt the sensation of flying that was promised

class and I got to the end of the session feeling as if I’d had a good workout.

However, although the session included a small amount of jumping and spinning while hanging from the bar, I never felt any real sensation of flying – the promise at the heart of the workout. I also occasionally felt the moves were only tenuously linked to the FlySet; we would easily have been able to do some of the exercises without it. JUKARI will no doubt gain loyal fans – one of the girls in my class told me she goes four times a week. Perhaps really feeling as though you’re flying in JUKARI comes later, as you get stronger and more able to do advanced moves. ●



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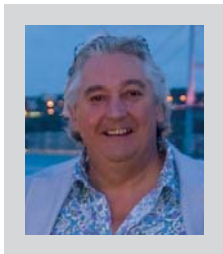


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Don Genders

Co-founder, Hydrothermal Spa Forum

Hydrothermal areas are one of the most technical and expensive elements in a spa. Yet operators, consultants and designers know the least about them. With this in mind, designers and manufacturers of hydrothermal equipment have set up the Hydrothermal Spa Forum to share some of their knowledge with the wider spa industry

on issues such as the ventilation, design and layout of heat and wet experiences.

Co-founded at the 2009 Global Spa Summit by Don Genders, MD of Design for Leisure, and Rolf Longree, MD of Lux Elements, the organisation is still finding its feet, but after a meeting this October it has renewed vigor and more certainty of its direction. Genders tells us more.

After the initial formation, the association went quiet for a while, why was this?

There have been many legal issues to sort out. Initially, we were going to call ourselves the Global Hydrothermal Spa Standards Association, until we discovered that legally this could lead to many problems. If someone adopted our standards and then there was an accident or claim against the property, we could be sued. The professional indemnity policies we looked at to cover ourselves were very costly, so we downgraded the standards element to best practice and eventually came up with the Hydrothermal Spa Forum as a name.

What is the forum's main aim?

We are an association of industry professionals, who want to put knowledge into the public domain. We will write guidelines, which interested parties – such as spa consultants, designers and architects – can refer to as consultation documents. Hopefully we will create a library resource of downloadable papers for those designing spa areas.

Why is this organisation needed?

We're setting it up in response to criticism of the industry that hydrothermal suppliers are unnecessarily secretive about standard equipment specifications and layout. The design of a hydrothermal area is one of the most technical (and expensive) elements of a spa. It is also an area that consultants, designers and operators know the least about.



The organisation was co-founded at a Global Spa Summit breakout session in 2009 (above)

Unfortunately, when designing high-end spas, which owners want to be bespoke, there isn't a blueprint for the design of the equipment or the area (see SB10/3 p12). We want to put across the message that we are not mysterious, that this is a complicated issue, and that we're willing to make public as much information as we can about how to design an area safely and effectively.

What areas will you advise on?

There are many basic design mistakes still being made, because architects generally don't know how to design hydrothermal spa areas. They think it's just a case of drawing a number of boxes and forget that pools and steamrooms need a lot of space for technical equipment.

We will highlight some of the common mistakes, such as not putting steam inlets under benches in steamrooms.

As well as give advice on matters such as how much space needs to be used for getting people hot and how much for getting them cold.

How many members do you have?

While we've been thrashing out details, it's just the founder members: Design for Leisure, Lux Elements, Barr and Wray, Haslauer, Klafs and Thermanium. However, now that we've decided on a direction we can start recruiting more members.

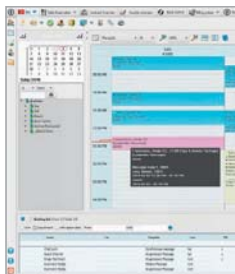
Is there a fee for joining?

We were going to charge a fee to cover costs. However, this caused legal and VAT issues, so membership is free.

Why should companies join?

We are hoping companies will enjoy the opportunity to be part of the forum to take the industry forward. ●

For more information, or to contact any of these companies, visit www.spa-kit.net



TAC software now available in more than 50 countries

TAC, the Austrian software vendor, has installed its Reservation Assistant Spa & Activity Software in more than 50 countries, following its work at the Park Hyatt Jeddah in Saudi Arabia. Available in 16 different languages, a Chinese version of the software is also now also on offer. TAC estimates that 4,500 users work with the software each day.

spa-kit.net keyword **tac**



Luxury new OCCO spa brand makes its debut

A luxury new spa brand called OCCO has launched. Comprising a total of 65 products that are split into seven ranges, each named after an area in Croatia, the products contain a minimum of 95 per cent natural ingredients and 100 per cent natural fragrances. Headed up by Anna Doyle, her previous experience includes posts at Thalgo and Molton Brown.

spa-kit.net keyword **occo**



Glass feature doors from Craftsman Quality Lockers

Craftsman Quality Lockers' glass feature doors can be easily installed within a line of lockers. Clients can choose from a Tiffany window-style display to promote a single product or there is also a series of reflective glass doors in a variety of colours available. The glass is installed using a mounting system that greatly reduces the risk of doors shattering.

spa-kit.net keywords **craftsman quality**



Global launch for Samadara™ Ultimate Age-Defying Crème

Sodashi has introduced its Samadara™ Ultimate Age-Defying Crème. Said to be the company's most powerful anti-ageing treatment yet, the product has been five years in the making and was created by Sodashi's founder, Megan Larsen. Featuring a range of antioxidant-rich plants, it is intended to promote the skin's own natural healing abilities from within.

spa-kit.net keyword **sodashi**



Decléor's Harmonie Calm skincare range is unveiled

Decléor has created a new range of products for delicate, sensitive skin. The Harmonie Calm range features four products as well as a salon-only Harmonie Calm Intense treatment. The lacto calm complex at the heart of each formulation features Damask rose essential oil. Including a day cream and gel cream mask, each product is colourant-free and contains no mineral oils.

spa-kit.net keyword **decleor**



Heated loungers and hammam revealed by Sommerhuber

A range of products have been released by Sommerhuber including a heated lounger called the Lounger Two. The loungers have been created with a 'floating' design from ergonomically-formed ceramic and are available in 19 different glazes. Meanwhile, the hammam has a linear design and features a table with only one joint and ceramic heat radiation.

spa-kit.net keyword **sommerhuber**

For more information, or to contact any of these companies, visit www.spa-kit.net



Ashiyu foot spas to pamper guests in relaxation areas

A new line of mini foot spas for soaking feet and lower legs are an ideal addition for exterior or interior placement in spas. Inspired by Japanese foot baths, the foot spas can fit up to four people at once and the water is heated to 108°F. Each spa is custom-built and comes in a range of five different shapes including a wide style in cedar, topped with slate stonework or tiles.

spa-kit.net keyword **ashiyu**



IBD introduces a lightweight UV gel polish

IBD has introduced a new range of lightweight UV gel polish. Called Gelac, the product is applied like a polish with the longevity of a gel and can be completely soaked off in 10 minutes. Available in a total of 12 classic shades including a number of reds, pinks and nudes, the Gelac range also includes a nail prep, a top coat, a base coat, a cleanser and a remover.

spa-kit.net keywords **graffon international**



Microsalt launches the SaltPro1 system for spa clients

Microsalt, the supplier of controlled dry salt aerosol solutions, has launched the SaltPro1 system. A cost-friendly micronizer, it is suitable for use in smaller halotherapy rooms, when a controlled dry salt aerosol microclimate is needed but where non-stop operation is not required. It was developed specifically for spas which offer respiratory and skin cleaning treatments.

spa-kit.net keyword **microsalt**



Babor's HSR® de luxe anti-ageing series is unveiled

Babor has unveiled its new anti-ageing series called HSR® de luxe. Combining the high performance active ingredient HSR Telovitin as well as an HSR Lifting Integral Complex to stimulate the regeneration of collagen, products include the HSR de luxe ultimate anti-ageing cream; an anti-ageing cream rich for dry skin and an anti-ageing serum.

spa-kit.net keyword **babor**



Attain a radiant glow courtesy of ila's luxury new collection

The new Glowing Radiance collection from ila comprises four products. Each contains pure rose damascena otto essential oil, sourced from India by ila's founder Denise Leicester. The roses are grown in very pure conditions and are harvested at dawn, according to ancient traditions, to harness their vitality and then distilled within a few hours.

spa-kit.net keyword **ila**



European debut of Shiseido's make-up simulator mirror

Shiseido has unveiled a new make-up simulator mirror. Said to be the first of its kind in Europe, the technology has been installed at Selfridges department store in London, UK, and was previously only available in Japan. Able to virtually create make-up application, the Makeup Simulator is equipped with a camera to capture real-time movement and expression.

spa-kit.net keyword **shiseido**

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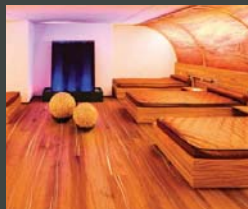
Sauna



Foot reflexology bath



Treatment pools



Relaxation



Holistic Cocooning



Herbal bath rose



4 Senses Lounger

- PRODUCT FOCUS -

Heat experiences

We take a look at some of the most innovative and stand out heat experiences on the market

Klafts green sauna

From the traditional Finnish sauna, to the Native American sweat lodge, hot rooms are the mainstay of any thermal area. Health benefits include improving blood circulation and eliminating toxins.

Klafts is now offering a Green Sauna package, starting at €590 (US\$818, £520), which can reduce energy consumption by over 40 per cent. It can be integrated into all existing Klafts sauna models and the functions are activated by a touch pad. The same heat for significantly less energy input is made possible with the addition of an electrical flap and



Energy-saving is controlled by a touch pad (below) and can be added to existing Klafts saunas (above)

a double-walled Eco Plus thermal ceiling, which keep the heat in the cabin for longer. All the energy-consuming devices – such as the sound equipment, coloured lights, or light features – operate only when the cabin is occupied via a motion sensor to also reduce energy consumption. Sustainable wood is used too.

spa-kit.net keywords **klafts**



Champneys, UK, charges £50 a session

Cryotherapy

It may sound unpleasant, but spending three minutes in a chamber cooled to a bracing -135°C , is actually an exhilarating endorphin pumping experience, according to Champneys Tring, in the UK, which is now offering cryotherapy (or kriotherapy).

Pioneered in Japan in 1978, and popular in Eastern Europe, the health benefits of chilling the body to this extent are numerous: relieving symptoms of fatigue, depression and sleep deprivation; aiding menstrual pain, improving cellulite appearance, as well as helping the symptoms of long-term illnesses such as MS. Workouts are enhanced after time spent in a cryochamber, so Champneys

offers packages which combine time in the room with an exercise programme. For this reason, it is popular with elite sports people.

Only three minutes can be spent in the chamber and modest exercise has to be undertaken. In addition, wooden clogs, socks, gloves, a mouth mask, a top and shorts must be worn.

While Champneys charges £50 (US\$79, €57) for its basic cryotherapy package (25 minutes cryotherapy, 25 minutes exercise), this is still an expensive treatment to run because of the need for nitrogen and specialist staff. Nitrogen pressure tanks and oxygen levels, need to be regularly monitored. For a first-person account of cryotherapy (see SB09/2 p71).

THE CHILL®: Getting cold closes the pores, it is also a mild stressor, which kick starts the immune system and boosts blood circulation. Design for Leisure has come up with The Chill® – a cooling experience, which is much cheaper to install and run than an snow room or cryochamber. The Chill, expected to launch in early 2011, has a footprint of only 1.5m, although

a larger, two-person model is on the drawing board. Prices start at £29,995 (US\$47,100, €34,150). In comparison, snow rooms cost around £175,000 (US\$274,800, €199,150).

"You only get the health benefit from being hot, if you then get cold and the more quickly you swap, the greater the health benefit," says MD, Don Genders.

The Chill uses cool misting sprays and works with air conditioning to bring the temperature down to 16°C . A fog-like mist is created in the cubicle and users inhale the air, which cools the body faster.

As it can be operated by customers, it doesn't have to be in constant use, making it economical to run.

spa-kit.net keywords **design for leisure**



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Serial Bath

Salty Steam Bath
Salt Peeling
Hamam
Hamam Massage Table
Hamam Bench
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Snail Shower
Round Shower
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Hydro Pool
Floatation
Swiss Hydro Compact

Tepidarium
Caldarium
Inhalation Bath
Aroma Bath
Crystal Bath
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Offices:

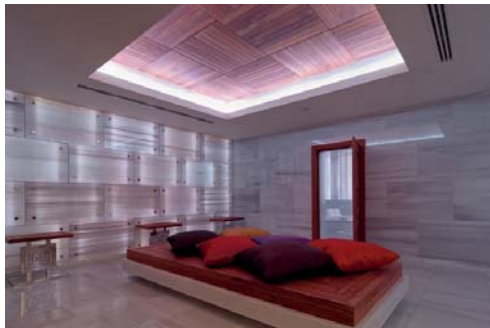
Europe

Middle East

South East Asia

South Asia

www.geospa.de



Savvy operators such as Swissôtel the Bosphorus are recreating hammams with a modern feel

Hamams

"Hamams can be traced back to 641AD and the Arabian conquest of Alexandria, Egypt. They then spread across Europe with the Ottoman Empire," says Richard Bishop, UK director of NOLA 7. Even the British Empire once had 600 hammam buildings.

Authentic hammams are housed in large ornately-decorated buildings with three main areas, the *sicaklik*, a hot room with a 'gobek tasi' or sweat stone as the source of heat, and with humidity provided by water flowing over the heated surfaces. The *tepidarium*: a warm room to raise the body temperature and the *sogukluk*, the cooler relax room. Traditional hammam massages include vigorous exfoliation of the body with a coarse mitt, followed by

rich soapy lather cleansing and culminating with an intense sports-like massage. Besides cleansing, the experience improves circulation and includes intense massage and joint manipulation to relieve pains. The experience is very appealing to men and would be ideal for operators who want to entice them into their spa facility.

Some leading operators, such as Swissôtel (above), are recreating hammams with a modern interpretation to give them a selling point. With space considerations prime in modern spas, NOLA 7 replicates traditional hammams with L-shape steamrooms which incorporate massage tables. Cooler heated relax loungers are then located in relaxation retreats outside the steamroom.

spa-kit.net keywords **nola 7**



Temascals are being updated and included in modern spa offerings

Temascal

St Lucia's new Rainforest Spa, at The Jalousie Plantation, has included an authentic temascal, made from earth, as part of its offering. Director of PR, Molly McDaniel, says the decision was taken to include a temascal to firmly reconnect the resort to the island's original Amerindian and Carib-Indian settlers, and Jalousie's owner, Roger Myers, travelled to the mountain border of Guatemala and Honduras to research the concept.

A temascal – a sweat lodge used in the Meso-American cultures – is a place for ceremonial and therapeutic rituals.

Red hot volcanic rocks are placed in a central pit, over which an infusion of medicinal herbs are poured to produce a steam, which cleanses the respiratory and digestive tracts, tones the skins, reduces stress, improves blood circulation, helps weight control, calms premenstrual cramps and post-partum pain and can ease muscular and osteopathic problems. The ritual also generates a meditative state.

RUSSIAN BANYAS: Stemming from the latin word, *balneum*, which means to get rid of disease, pain and sadness, Russian banyas are part of an ancient Russian tradition, mentioned in chronicles dating back to 1000AD, and still central to Slavic life. Benefits include improving blood circulation and kidney function, detoxing and balancing energy.

The experience takes about three hours and involves a number of steamrooms; a massage with either birch, oak or eucalyptus twigs and a Russian soap massage. In between, users relax with seasonal drinks, smoothies



Up to 100 different types of steam can be made

or kvass, made from black rye bread.

A host known as a *poparshita* (female) or *poparshik* (male), leads the experi-

ence – up to 100 different types of steam can be made according to the amount of water and scents added and wafting techniques – and providing the massage.

The Amber Spa Hotel in Latvia (see SB10/3 p56), has recently modernised the concept with contemporary equipment and highly trained staff, while maintaining traditional rituals. Hotel guests and spa members use the banya for free, while walk-in customers pay £15 (US\$24, €17). General manager, Alla Sokolova, says the banya accounts for around 40 per cent of the spa's revenue.

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High street spas, such as Dove Spa are the most popular with UK consumers

We give an overview of UK consumer attitudes towards wellness, health and fitness

Leisure-net Solutions, a UK leisure market intelligence company, has questioned people in the UK about their thoughts and perceptions of spas and wellness facilities and treatments.

Every year Leisure-net produces the HAFOS – Health and Fitness Omnibus Survey – report, which is regarded as a fitness industry barometer of UK consumer attitudes and towards health, activity and the active leisure sector. In 2010, a focus on wellness was included in the street survey which targeted 1,600 members of the public.

KEY FINDINGS

Out of the people questioned, 61 per cent said that spa treatments are a special treat that everyone should enjoy now and then, however, only 20 per cent believed that spas are a lifestyle choice that everyone should use on a regular basis to help manage stress and enhance relaxation.

When specifically asked whether a spa was somewhere with lots of water features, 85 per cent strongly agreed or agreed.

Of those who had treatments within the six months previous to the survey, 61 per

cent had therapies such as manicures, pedicures and facials; 45 per cent had gone for complementary therapies including massage and acupuncture; and only 11 per cent had tried a medical therapy of some kind.

Overall, 45 per cent had their treatment on the high street, 25 per cent visited a hotel or health club/leisure centre spa, 11 per cent chose a day spa, and 9 per cent had their treatment in a true destination spa (an overnight destination where spa was the main focus). For complementary therapies, 12 per cent used a high street salon and 18 per cent visited a health club/leisure centre or hotel.

Sixteen per cent of respondents said they were likely to have another treatment in the next six months after the survey.

For those who said they were unlikely to have a treatment in the following six months, the main barrier was cost/perceived lack of value for money (58 per cent). Other responses included 26 per cent who said there was no need/no benefit, 17 per cent who didn't feel they would fit in or enjoy the experience, 7 per cent who felt intimidated and 4 per cent who didn't feel they knew enough or knew where to go. ●

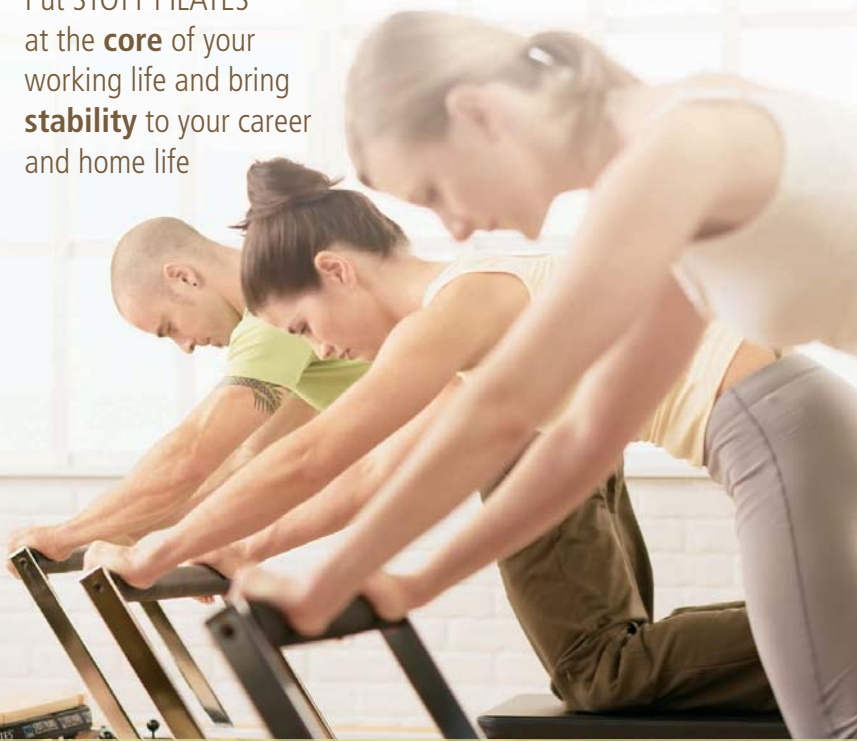
Call and email focus

For the first time in 2010, Leisure-net also conducted a call-Focus™ and email-Focus™ survey on the UK spa sector to find out – via mystery shops – how well operators responded to customer phone and email enquiries. Around 10 per cent of the UK's spa operators were tested.

Overall, with calls, spas scored highly in showing their contact details clearly on the web (78 per cent), picking up the call within five rings (82 per cent) and answering the enquiry in full and were also rated extremely well for friendliness (87 per cent) and professionalism (79 per cent). However, customers were only prompted to make an appointment in 8 per cent of calls.

Interestingly, emails elicited a much poorer quality of response. Thirty-six per cent of emails were not even replied to and out of the messages that were received only 32 per cent met overall levels of best practice such giving an individual response. A meagre 12 per cent of operators informed customers about special offers in emails.

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