

spa business



Darrell Metzger

Heading up government tourism investment in Malaysia

HOT NUMBERS

Middle East spa benchmarks revealed

+ the latest US hotel spa stats

SPA SPOTLIGHT

Zurich, Kuwait and Koh Samui

Online wellness gaming

How to make healthy lifestyles addictive

INVESTIGATION

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The wellness challenge

In mid-April, I went to the excellent TEDMED conference in Washington DC and had a thought provoking week hearing about the future of health and medicine.

Although the majority of speakers took the conventional view of disease as something to be 'cured' with drugs and surgery, there were also a number of speakers who challenged this. Mark Hyman from the Institute for

Functional Medicine argued that we should make a clear distinction between conditions which can be prevented or resolved by lifestyle change – such as obesity and heart disease – and medical situations such as accidents which require surgery and drug therapy.

He said we've reached a tipping point where there are more obese people in the world than people who are starving and that this problem can be most cheaply and effectively dealt with through lifestyle change.

I'd always naively assumed the spa and wellness industries and the medical sector share broadly the same goal of a healthier world, however, I came away with a different impression. For drug companies and some parts of the medical profession, it appears that the optimal outcome is large numbers of people who are well enough to stay alive for long periods of time, but sick enough to need constant medication, so they're effectively being farmed for profit.

And creating combinations of drugs can be even more lucrative – one speaker explained there are diabetes



Drug companies need large numbers of people who are well enough to stay alive for long periods of time, but sick enough to need constant medication

drugs that cause heart problems and heart drugs that cause diabetes – he referred to this as 'pharmageddon'.

I'd always thought it was a lack of pharma development which led to this happening, but the more sinister explanation is that once you have a contraindication, you've created a market for another product.

I came away with the view that wellness and conventional medicine are in competition.

So what's the answer? Firstly, to find allies within the medical world and to collaborate with them to build a body of knowledge which proves that lifestyle change works. Secondly, to work with the corporate health sector because they have the same objectives. Thirdly, to work with government health providers who are focused on reducing costs and fourthly, and most importantly, to educate consumers, so they understand they have the power to remain healthy and to cure disease through great lifestyle choices.

Liz Terry, editor twitter: @elizterry



Read editor's letters from previous issues of Spa Business at blog.spabusiness.com

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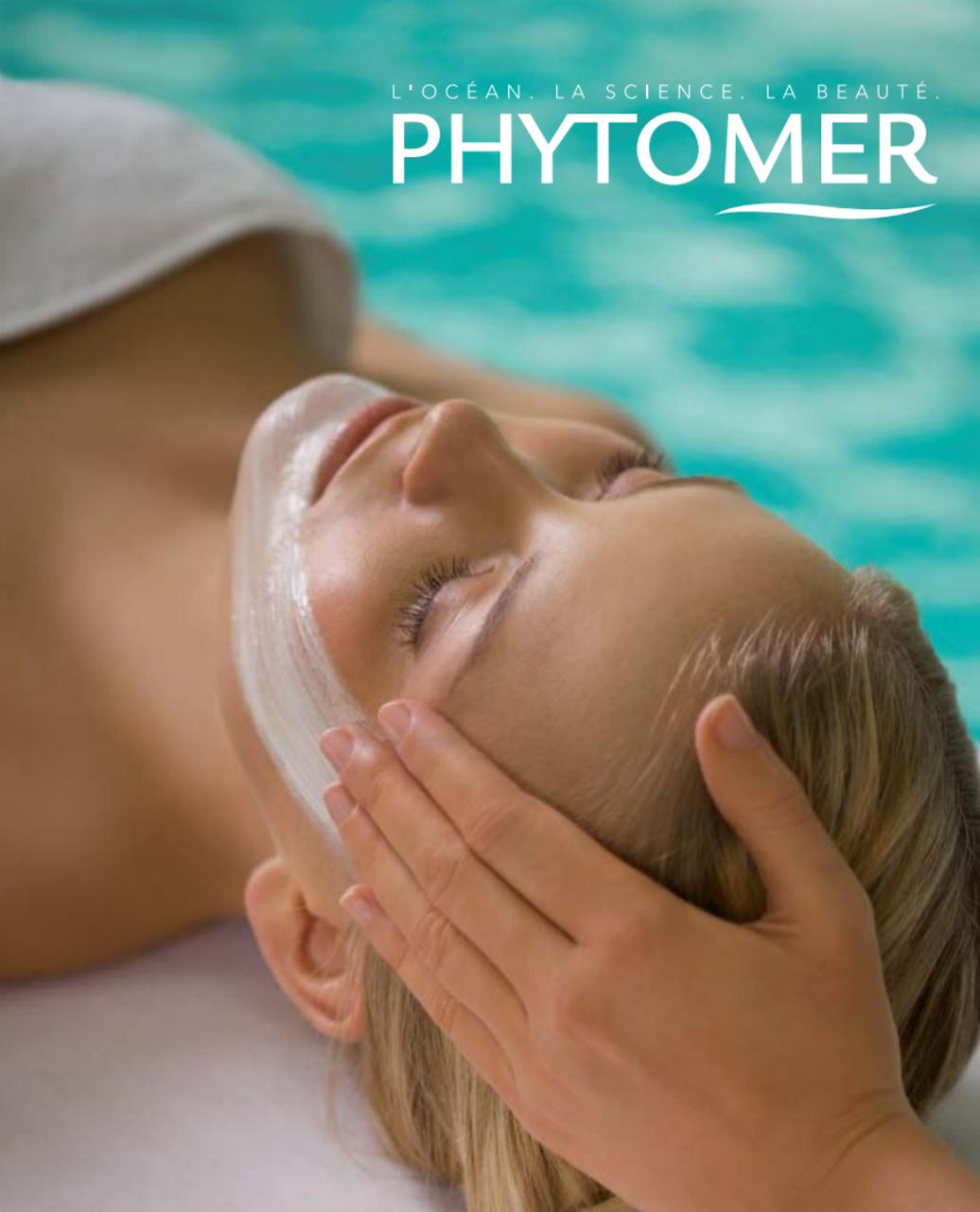
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Leonor Stanton is an independent hospitality and spa consultant who specialises in market and commercial assessments and financial planning in the hospitality and spa sectors worldwide. She previously worked for Deloitte Consulting and Deloitte Corporate Finance.



ON THE COVER

Clarins' Spa Life is part of an industry movement towards gaming (p80)

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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

Menu-engineering is far more complex than just looking at sales and profits

Sonal Uberoi, director, Spa Balance

In reference to the article written on menu engineering in *Spa Business* (SB12/1 p26), it's important to point out that although menu engineering is an essential process, it cannot be looked at in isolation. It must be looked at as part of the totality of spa operations.

I agree that when looking at menu engineering, key aspects such as type of property, competition, price point, stock levels, adequate staff training and also involvement of the entire spa team, therapists and receptionists need to be taken into consider. These are an important factor in ensuring that a particular treatment is sold or not. The way the treatment menu is written is also important, and I agree with Sheila McGann [corporate director for spa brand quality at Shangri-la] that the more popular treatments should be listed at the top to entice the client to read on. Elemis' A la Carte menu – which takes into consideration the current economic climate and the buying power of today's

Menu engineering is not only about charting treatment sales and profit – it requires an understanding of the business, monitoring client feedback and engaging staff in the process



JASON STILT / SHUTTERSTOCK.COM

Uberoi agrees that it's best to put the most popular treatments on the menu first

consumer without undermining the brand – is also another key aspect.

However, I think it's also important to take into account the spa's yield management and operational systems. When are our peak hours? What is the turn-around time for each of our treatments? Who are our target markets? What treatments are they looking for? Which staff can perform which treatments? Additionally, what treatments can be linked to retail? We all know that it's challenging to sell a product off a massage. Can we upsell any treatments

with other services, treatments and/or products? A coherent treatment menu would also address these issues.

Hence, menu engineering is not only about looking at the CRASE system – which charts treatment sales and profit – it requires an understanding of the business, monitoring of client feedback and engaging of staff in the process. Moreover, every spa needs to tie this process in with their yield management and operational systems and ensure that they have a coherent marketing strategy and pricing policy in place.

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Spas are well positioned to take over from medical systems burdened by treating chronic diseases

Let's move beyond lip service for wellness

Samantha Foster, director of business development, Destination Spa Management

For most spas, wellness services are those that promote relaxation, and/or provide some means of empowerment to cope with stress, such as massage, yoga or meditation. For medi-spas and those with a higher tech focus, the most excitement has been around anti-ageing and longevity, ranging from cosmetic procedures to bio-identical hormone replacement.

Is this really wellness? A commonly cited definition is that "wellness is a state of complete physical, mental, and social wellbeing and not merely the absence of disease or infirmity".

Surely then, we should be doing more than a temporary reduction in stress or wrinkles! While we are eager to offer our clients the latest in anti-ageing, shouldn't we first be ensuring that a foundation of health is in place?

As wellness professionals, we need to understand the big issues that lie at the heart of global health concerns. For me, that means finding ways to deal with the world's biggest killer – chronic disease.

The World Economic Forum recently reported that the five most common chronic diseases – cancer, diabetes, heart disease, lung disease and mental health disorders – will cost the world US\$47 trillion (€36tn, £29tn) in treatment and lost wages by 2030. These largely preventable diseases are responsible for 63 per cent of all deaths worldwide.

Historically, we've left it to governments and the medical system to deal with chronic disease, however they're collapsing under the burden. The situation is now so large it can only effectively be controlled through a focus on prevention. Of all industries, the wellness industry is the best (and only) industry that is positioned to manage and prevent this pandemic.

To date, we've failed to address chronic disease head-on – perhaps it seems too big; perhaps because it's not as sexy as anti-ageing. Yet I strongly believe it is our biggest opportunity – both in terms of business and social contribution.

In this era of improved technology and increased collaboration, the opportunities to positively impact on our guest's health and lifestyle are ever-expanding. To that end, I've started a new LinkedIn group: Wellness Alliance against Chronic Disease. If you'd like to join the discussion and collaborate on solutions, please sign up.

Some reflections on menu engineering

Peter C Anderson, owner, Anderson & Associates

The concept of free-form treatment delivery highlighted in a *Spa Business* feature (SB12/1 p26) – where there are four basic treatments, constrained only by time – recklessly ignores cost controls and product consistency, the backbone of menu engineering.

Financial analysis is also key. And we start to muddy this process if we divert our emphasis to the more creative, cultural/ locational and brand-based components of menu engineering.

However, understanding why an item may not be popular or knowing what can be done to enhance margins is where the real work begins. This is the alchemy that transforms our financial data into comprehensive and actionable information.

In addition, while its roots lie in disciplines used in food and beverage, the menu engineering process for spas is different – guests lying naked at US\$3 per minute, have different sensibilities and expectations from diners. Well-vetted chefs should be able to execute every item on the restaurant menu; the same is not always true for therapists. Therefore, training and staff development costs (over and above the payroll associated with the specific treatment delivery), must be quantified and factored-in when making menu inclusion and exclusion decisions, especially in markets with a shallow employee base.

While it may appear that customers are looking for smaller price points, the truth is their search is actually for value-for-money. Customised mini-protocols tailored to their needs are a step in the right direction, as they provide flexibility in choice and price. A dynamic menu, in sync with evolving guest expectations allows you to have treatments that are both popular and profitable.

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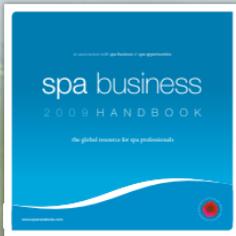
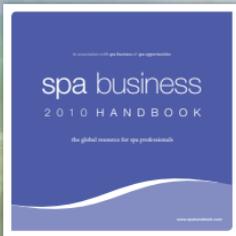
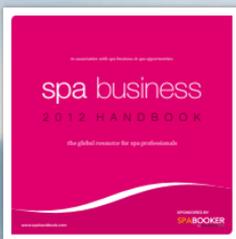
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Banyan Tree masterplans new Vietnamese resort

Banyan Tree has been appointed to master-plan Vietnam's first fully-integrated resort development, Laguna Lang Co. Once complete, the resort will host seven international hotels with 2,000 guestrooms.

The first us\$200m (€154m, £124m) phase of the 28-hectare (692-acre) scheme is due for completion in late 2012. It will boast up to 1,000 residences for sale and two Banyan Tree resorts: Banyan Tree Lang Co and Angsana Lang Co comprising 350-keys combined and two spas.

Banyan Tree Spa Lang Co will house 10 treatment rooms over 2,555sq m (27,500sq ft) and a yoga pavilion. The 2,040sq m (22,000sq ft) Angsana Spa Lang Co will also have 10 treatment rooms, plus two signature rainmist rooms and a relaxation area. *Details: www.banyantree.com*

Maldives spa ban report

For our in-depth news investigation on the background of the spa ban in the Maldives and its impact see *Spa Opportunities* – the sister magazine to *Spa Business* – issue 137. *Details: <http://lei.sr?a=U8X5c>*



Thailand wants to tap into health tourism

Thailand eyes future as leading wellness destination

The Thai government has revealed plans to establish the country as a leading destination for wellness, spa and medical tourism over the next two years.

The strategic goal will be a substantial upgrade on the government's previous project to establish Thailand as the spa capital of Asia – which came to a close in 2008.

The ambition is for Thailand to become a world-class health provider by 2014 and for the sector to achieve total earnings of us\$11.5bn (€8.9bn, £7.1bn) over the five-year period between 2010 and 2014.

Initiatives to help reach the goal will include investment into infrastructure, as well as customer-facing campaigns. *Details: <http://thailand.prd.go.th>*

2013 launch for Xiangshan spa

Xiangshan Hot Spring and Wellness Center, a new oceanfront bathing attraction reported to cost us\$25m (€19m, £15m), is scheduled to open in China in August 2013.

Located next to the Hilton Ningbo Xiangshan Resort, the centre is designed by US-based WATG and Thailand-based GOCO Hospitality and incorporates a 6,000sq m (64,583sq ft) standalone wellness centre.

The centre will house 24 treatment rooms – including two suites and a spa pavilion. Meanwhile, a medi-spa and a weight management clinic with seven suites will provide a unique selling point.

The centre will also offer results-oriented wellness programmes addressing health concerns such as detoxification and beauty enhancement. Product houses will be Ila and Comfort Zone.



GOCO Hospitality and WATG are designing the new Xiangshan facility

Other indoor facilities will include a women's beauty salon; a male grooming area; relaxation areas and quiet zones; and water experiences such as vitality pools.

A 5,000sq m (53,820sq ft) outdoor bathing area will offer mineral and thermal springs. *Details: www.goco.com*

AW Lake selected for Dubai Pearl project

Singapore-based consultancy AW Lake has been appointed master spa strategist for the luxury Dubai Pearl scheme in the United Arab Emirates.

The us\$4bn (€3bn, £2.4bn) mixed-use complex is to cover 1.85sq km (0.7sq miles) and will house a number of spas.

AW Lake has been chosen to design the strategy and integration for all Dubai Pearl's spas, including facilities for onsite international hotels operated by Bellagio and MGM, as well as Starwood Capital's first Baccarat property.

The total number of spas is yet to be disclosed, although AW Lake will position each one within their respective hotels, as well as aligning them with Dubai Pearl's overall vision.

When open, Dubai Pearl will be marketed as a complete leisure destination and will



The mixed-use complex will include Bellagio and MGM-operated hotels

feature seven five-star hotels with a total of 1,400 bedrooms, art galleries and theatres. The first hotels will open in 2013.

Dubai Pearl is located in the Dubai Media and Technology Free Zone and is owned by Pearl Dubai FZ LLC, a consortium of investors led by the Al Fahim Group. *Details: www.dubaipearl.com*

Pop Up Kids Spa to return to Shanti Maurice resort

A Pop Up Spa for guests aged between five- and 15-years-old is to return to Shanti Maurice in Mauritius between July and September.

The facility has already operated at the resort throughout April in order to give its younger guests an experience of the Nira Spa.

Spa manager Novie Jones said: "With an increase in children's spa interest, instead of turning our younger guests away to protect the adults only haven that is Nira Spa, we simply pamper them in a different area." *Details: www.shantimaurice.com*

Pegasus acquires Six Senses

US-based private equity group Pegasus Capital Advisors has entered into an agreement to acquire the luxury resort and spa businesses of Six Senses Resorts and Spas.

Pegasus will acquire all of the Six Senses and Evason-branded resort and spa management contracts and related intellectual property rights and operate them under a new company managed by Pegasus and its affiliates.

Six Senses currently manages 10 resorts and 28 spas in 20 countries and has another 15 under construction or in development. Bernhard Bohnenberger, president of Six Senses, will continue in his role and will head operations out of the Six Senses Bangkok office.

The Soneva brand and resorts, as well as the company's real estate assets and holdings, however, are not included in the transaction.



Six Senses currently operates 10 resorts and 28 spas around the world

Craig Cogut, the founder of Pegasus, believes that the deal will allow Six Senses to grow its brand further. "Going forward, the new Six Senses will be a debt-free company with committed capital for expansion into new and within existing markets," he said.

Details: www.pcalp.com

Langham to create new At One spa brand for Eaton

Hong Kong-based Langham Hospitality Group (LHG) is working on a new signature spa brand for its portfolio of mid-scale Eaton hotels.

Exact details of At One are yet to be revealed, but it's understood that the new brand will be a contemporary, design-oriented offer for the

six Eaton sites that are open and under development across Asia. LHG currently has one main spa brand – Chuan Spas.

Barry White, group director of spa for LHG, confirmed the plans to *Spa Business*.

Details: www.langhamhospitalitygroup.com

Loisium plans second wine and spa resort

Austria's Loisium Wine and Spa Resorts will open its second spa hotel in the wine region of south Styria, in June.

The 105-bedroom hotel will comprise two wine-themed restaurants and a wine bar, as well as a 1,400sq m (15,000sq ft) Wine Spa.

Eight treatment rooms – including two doubles – a relaxation area, five saunas, outdoor pool and a fitness zone will form part of the spa. There will also be a consultation area, a retail space and a spa bar with an open fire place and lounge.

The first Loisium property opened in Langenlois, Austria, and has an Aveda destination spa – one of only seven worldwide (see sb06/4 p104). The second spa will also offer Aveda products alongside wine-themed treatments.



The 1,400sq m spa will offer Aveda and wine-themed treatments

A third hotel in Alsace, France is due to open a with 10-treatment room spa in 2014.

Loisium sites are marketed as a four-star superior wine hotels with iconic buildings designed by US architect Steven Holl.

Details: www.loisium.at

Global spa management study launched by GSWW

The Global Spa & Wellness Summit has appointed research specialist SRI International to conduct a global study on the state of spa management education and training.

The study, which is already currently underway, is to be conducted in three stages – the first of which will establish a baseline understanding and data on the current availability of spa management education and the supply of management graduates.

It is hoped the final stage of the research will lead to the publication of recommendations to address gaps between market needs and spa management education offerings, as well as other challenges related to spa management skills and training.

The results of the research are due to be unveiled at the forthcoming summit in Aspen, Colorado, US, in June.

See p38 for our own investigation on spa management training worldwide.

Details: globalspaandwellnessummit.org



A natural thermal mineral water spa is proposed

UK's Buxton Crescent project moves forward

The development of the UK's "first genuine spa hotel" for more than 100 years in Derbyshire, has moved forward with the signing of a landmark agreement.

Landowners High Peak Borough Council and Derbyshire County Council confirmed an historic deal with the Buxton Crescent Hotel and Thermal Spa Company for the scheme had been secured on 2 April.

The £35m (US\$56m, €44m) Buxton Crescent project includes restoring the listed Crescent building and listed Natural Baths and Pump Room.

A 79-bedroom spa hotel incorporating the Natural Baths is at the centre of the plans, in addition to a 2,000sq m (21,528sq ft) natural thermal mineral water spa.

The spa will comprise a dry area with six massage rooms; and a manicure and pedicure area, as well as electrotherapy, thermal peat wrap and inhalation facilities.

Details: www.buxtoncrescent.co.uk

Seychelles academy to invest in spa training

The Seychelles Tourism Academy (STA) is looking to improve the skill levels of the country's spa and wellness workforce by investing in the training of its specialist training staff.

STA, the institution responsible for the training of Seychellois students for careers in the tourism sector, will send its spa and wellness lecturers to undergo a number of work placements to improve their knowledge of the latest spa trends.

The first placement will see spa training staff spend two-weeks at the luxury Shanti Maurice Hotel and Spa in Mauritius, which is operated by the Nira Hotel Group.

As part of the ongoing scheme, STA has signed a memorandum of understanding with Nira which will allow further placements of spa trainers.

Details: <http://www.seychelles.travel>



All four new Shangri-La openings will have spas

Shangri-La to open resorts in Sri Lanka and Qatar

Hong Kong-based Shangri-La Hotels and Resorts is to open four new properties – two in Sri Lanka and two in Qatar.

Work has started on the two Sri Lankan resorts, with Shangri-La Hambantota Resort and Spa to open in 2014. The 315-bedroom property will include the signature CHI, The Spa at Shangri-La concept, which will house ten treatment rooms.

The second, Shangri-La Hotel Colombo, is due to open in 2015 and will include a spa with eight treatment rooms.

In Qatar, Shangri-La Hotels and Resorts will operate the Shangri-La Hotel, Doha and Traders Hotel, Doha – both of which are scheduled to open in 2013.

The 272-bedroom Shangri-La Hotel, Doha will comprise CHI, The Spa at Shangri-La, while, the 238-bedroom Traders Hotel, Doha is set to incorporate a health club and spa with an indoor swimming pool.

Details: www.shangri-la.com

Fletcher's Cottage opens in UK

A 750sq m (8,000sq ft) day spa has opened at the Archerfield Links championship golf course and estate near Edinburgh, Scotland, UK.

The Fletcher's Cottage Spa houses seven treatment rooms – including a double treatment room and a salt brick inhalation room.

A relaxation lounge with a wood burning oven also features, along with a walled garden containing two seaweed bathing houses acting as additional treatment areas.

Other spa facilities, designed and supplied by Nola 7, include a marine salt steamroom, herbal aroma sauna and a mud cure room. The product houses are Voya, Aromatherapy Associates, Spiezia and Margaret Dabbs.

Consultant Sian Parry Jones created the spa concept which has an ethical approach to wellbeing that is "in harmony with nature". It will



Nola 7 supplied bespoke spa facilities including a herbal aroma sauna

be marketed to both golf club members and guests staying in the accommodation.

It is reported that author Robert Louis Stevenson was inspired to write the classic *Treasure Island* novel during a stay at the Archerfield estate which overlooks the North Sea and has views of the local Fidra Island.

Details: www.archerfieldgolfclub.com

Nicaraguan mega-resort reveals spa details

Seaside Mariana, a mega-resort being built in Nicaragua, is due to complete its first phase of development in the second quarter of 2013.

The 923-acre (374-hectare) complex is divided into six neighbourhoods. It will be anchored by the Wyndham Nicaragua Resort and Casino and a Jack Nicklaus golf course – both of which overlook the Pacific Ocean.

Grupo Mariana, the developer behind the scheme, has created its own signature Plumeria Spa concept for Seaside Mariana, inspired by Nicaraguan cultures and rituals.

Two Plumeria-branded spas are being built – the first of which will open at the Laya Hotel in mid-2013 and will span 1,200sq ft (111sq m). It will house four treatment rooms.



Grupo Mariana has created its own signature spa brand for the project

The second spa – a 5,000sq ft (465sq m) venue – will form part of the Wyndham resort and is to open in 2014 with eight treatment rooms. All hotel, resort and spa operations will be run by KemperSports Management.

Details: www.grupomariana.com

Free treatments for female soldiers at New York spa

New York Day Spa in the US state capital has introduced a Veterans Spa Package – a trio of treatments free to all female US soldiers returning home from military action overseas.

The newly-launched marketing campaign is the brainchild of owner and founder of the

New York Day Spa, Dorit Baxter, who has come up with the idea after watching the homecomings of female veterans.

The Veterans Spa Package includes a therapeutic massage, a facial and a manicure.

Details: www.newyorkdayspa.com



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Taj expands Vivanta brand with two new spa resorts

Taj Hotels Resorts and Palaces has added two new Vivanta by Taj-branded spa resorts in India – in Bekal, northern Kerala, and in Begumpet, Hyderabad.

Both resorts include Taj's signature Jiva-spas. The Vivanta by Taj, Bekal resort is home to a Jiva Grande Spa, which is spread over 165,000sq ft (15,000sq m) and has single and double treatment rooms, beauty treatment rooms, and relaxation pools.

Vivanta by Taj Begumpet, Hyderabad incorporates a 950sq ft (88sq m) spa with two treatment rooms and a fitness centre.

The Vivanta brand launched in September 2010 and is positioned in the luxury, upper-scale market. A spokesperson said there is no individual spa brand for Vivanta, with each to include a Jiva or Jiva Grande spa. *Details: www.vivantabytaj.com*



The spa now boasts 18 hydrotherapy cabins

Espace Henri Chenot gets 24 new treatment rooms

Espace Henri Chenot, the destination spa created by alternative health specialist Henri Chenot at Palace Merano Italy, has reopened following an extensive overhaul.

Part of a wider multi-million euro investment in the hotel, the scheme included 24 new treatment rooms. The majority of work has been carried out on the spa's wet area – 18 of the new rooms are dedicated to hydrotherapy and have been equipped with an adapted version of Unbeschneider's Caracalla massage bath, as well as its Jouvence dry float bed (see p90).

The baths have been altered to complement Chenot's biologia method – which mixes Chinese and western medical techniques in a three-phase hydro-energetic cure comprising an underwater massage with additives, a body wrap and jet shower session.

Starpool of Italy also supplied equipment, while France-based Michel Jouannet worked on the project's design aspects.

Overall, the spa has been extended by 500sq m (5,382sq ft) and other new facilities also include a peeling room for scrubs. *Details: www.palace.it*

Bask concept launched at Revel

Bask, a spa and wellbeing concept, has been exclusively developed by mind body day spa chain Exhale for Revel – a US\$2.4bn (€1.6bn, £1.5bn) resort in Atlantic City, New Jersey in the US.

The 32,000sq ft (2,973sq m) sanctuary has a 3,000sq ft (279sq m) co-ed bathhouse at its core. Here guests can socialise and unwind in a salt grotto, hammam, steamrooms and heated mineral pools.

Bask also has 32 therapy rooms and a fitness centre will host Exhale's signature barre-based Core Fusion™ and yoga classes. A Bathhouse Bar, serving refreshing beverages, and lounge completes the offer.

The spa stocks products by 302, Actifirm, Tata Harper, ISClinical and Sircuit – the five skincare lines which are already used in Exhale facilities. Meanwhile, treatments range



A 3,000sq ft co-ed bathroom will be at the heart of Revel's new Bask spa

from hydrating facials through to therapeutic massages and acupuncture.

Exhale currently has 19 spa across the US, including three in Boston and seven in New York. It also has a spa at the Gansevoort Turks + Caicos resort in the Caribbean. *Details: www.revelresorts.com, www.exhale.com*

Work starts on Sandton Skye development

Construction is underway on the ZAR1.5bn (US\$188m, €145m, £117m) Sandton Skye lifestyle development in the financial hub of Johannesburg in South Africa.

The luxury residential and hotel scheme has been designed by local architects AMA and includes a ZAR8m (US\$1m, €773,900, £622,450) wellness spa featuring modern African and eastern design styles.

Spanning 450sq m (4,844sq ft), the spa will accommodate 12 treatment rooms, a fitness centre and indoor and outdoor pools. Treatments will focus on hydrotherapy, fish therapy and those by African product house TheraVine.

South Africa-based Simply Spas – the firm behind the Lanzarec (see SB09/4 p32) and



The luxury lifestyle development has been designed by AMA Architects

Oceana spas – will consult on Sandton Skye's spa element and manage it once complete.

The complex, with three 15-storey residential towers, is scheduled to open in 2014. *Details: www.sandtonskye.com*

Atkins designs Oman's new Medical City

Atkins, the UK-based engineering and design firm, has completed a masterplan of The Medical City – a major healthcare facility in Oman.

Apex Medical Group is leading the project, with the complex to occupy a site covering nearly 1sq km by the Arabian Sea. Facilities

include a hotel and a spa, although further details are yet to be confirmed.

The spa facility will be available to the public, while the 375-bedroom hotel is to be positioned at the high-end of the market. *Details: www.atkinglobal.com*

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June launch for London's Café Royal

London's historic Café Royal – once a restaurant and meeting place for legends such as Oscar Wilde – is to reopen as a luxury 159-bedroom hotel in June in time for the 2012 Olympics.

Following a reported €90m (US\$145m, €112m) lease deal and extensive three-year refurbishment, the Regent Street property will relaunch as a member of The Set – a new hotel collection established by property entrepreneurs Alfred and Georgi Akirov.

The hotel has been designed by London's David Chipperfield Architects and Donald Insall Associates and new additions include the 1,200sq m (12,900sq ft) two-storey Akasha Holistic Wellbeing Centre day spa with its own dedicated entrance at street level.

The upper floor will feature a yoga studio and gym. The lower level, boasting the main facilities, will include a 19m pool and five treatment



London's historic Café Royal is to include a 1,200sq m wellbeing centre

rooms – three with whirlpools – private and public hammams, a sauna and watsu pool.

Dutch-based 4SeasonsSpa provided technical advice as well as wet spa facilities. It also worked on the spa at The Set's Conservatorium Hotel that opened in Amsterdam in December. Details: www.4seasonspa-pro.com

New €70m spa hotel planned for east Finland

Work is expected to get underway later this year on a €70m (US\$91m, €56m) spa hotel in Lappeenranta, eastern Finland.

The property will be in a joint venture between two Finnish property investment companies – Ultivista and Conte Invest.

Exact details of the spa facility have not been disclosed, but it is believed that there will be more than 15 treatment rooms, a range of indoor swimming pools, a sauna world and a relaxation area offering views across Lake Saimaa.

Details: www.ultivista.fi

Final approval for Paris' Hermitage Plaza

Foster + Partners has confirmed that the Hermitage Plaza, a mixed-use development in Paris, France has been granted 'permis de construire' – the final approval.

The result of a close collaboration with city planning authorities EPAD, the City of Courbevoie, Atelier de Paysage Urbain and Département de Hauts-de-Seine, Hermitage Plaza is the first high-rise development in France.

Considered a national project, it is intended to regenerate the area east of La Défense business district with a sustainable, high-density community.

Hermitage Plaza incorporates two 320m (1,050ft)-high buildings. The twin towers will take the form of interlocking triangles and will enclose a large public piazza.



A panoramic spa will be among two wellness centres at Hermitage Plaza

There will be 538 apartments, two spa centres – including a panoramic spa – a luxury hotel and office space.

For more information on Hermitage Plaza and other Parisian hotel and spa projects, see SB11/3 p64. Details: www.hermitage.fr

DIARY DATES

15-17 MAY

The Hotel Show

Dubai World Trade Centre, Dubai, UAE
An event providing a networking and sourcing platform for up to 14,800 regional professionals. This year's event will also host the Middle East Spa Awards
Tel: +971 4 438 0355
www.thehotelshow.com

17-19 MAY

Sustainable Cosmetics Summit North America

InterContinental New York Barclay Hotel, New York, USA
This summit will explore some of the major product sustainability issues facing the beauty/spa industries.
Tel: +44 20 8567 0788
www.sustainablecosmeticssummit.com

3-6 JUNE

Global Spa & Wellness Summit Aspen Meadows Resort, Aspen, Colorado, USA

Held in partnership with the Aspen Institute, the sixth, invitation-only GSWWS is themed around Innovation through Imagination and will focus on the future of the global sector.
Tel: +1 212 716 1199
www.globalspaandwellnesssummit.org

21 JUNE

Forum HOTel and SPA

The Ritz Hotel, Paris, France
Now in its fifth year, this event is aimed at hotel and spa industry leaders.
Tel: +33 1 43 21 05 69
www.forumhotelspa.com

1-2 JULY

VITASPA Spa Expo and Medical Spa Conference

Sheraton Hotel, Buenos Aires, Argentina
The official World Congress Spa Society event in Central and South America.
Tel: +54 11 4468 0879
www.vitaspaestetica.com

8-9 JULY

Les Nouvelles Esthétiques Spa Conference

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Mandarin Oriental gives a very detailed spec on spa size and facilities to make the most of space

ASK AN EXPERT...

OVERBUILDING

In the early decades of the spa industry, large, opulent facilities – often costing millions – were built and launched with much fanfare and pride.

Owners, architects and designers competed to be the best and got swept up in the buzz. The bigger the spa the better, with operators vying to showcase more facilities, equipment, experiences and space than before.

However, in some cases, more attention was paid to design than budget and overbuilt spas struggled to break even on operating costs, let alone paying back capital or then going to make a true profit.

When the credit crunch struck, many struggled, and as spas are costed on a per square metre (sq m) or square foot (sq ft) basis, the bigger a spa, the more revenue it has to generate to hit target.

Can the spa industry continue to justify building large and expensive facilities? Or has the time come to downsize?

With operators facing increasing pressure to make figures stack up, many are starting to ask whether the building of such big facilities is justifiable or wise.

Pivotal to the question is the size and number of treatment rooms – the main revenue generating areas of spas. Large treatment rooms will limit the number which can be accommodated. And big echoing spaces don't necessarily create the best experience – they can leave guests feeling intimidated and uncomfortable.

On the other hand, can operators charge more for treatments delivered in larger rooms? Does the size contribute to a superior experience and justify higher rates? Spa suites for more than one person with showers, heat experiences and whirlpools – which are suitable for use when delivering packages and longer, signature treatments – are example of this category of room.

What's the optimum size for a treatment room? What's too big and what's the smallest space operators can get away with?

Is it possible to build a future-proof spa – one with a flexible design, where the size and number of treatment rooms can be easily reconfigured to accommodate demand? And is there a quick-fix solution for existing facilities that were built too big? We ask the experts.

The debate on spa sizing is between the marketing men – “give me a large spa so I can get a great hero shot, good PR and boost the hotel’s profile” and the accountant – “does the spa give me a good return on investment?”

Currently, the accountant holds greater sway and chains such as Shangri-La are down-playing the luxurious CHI, The Spa their in newer properties. Meanwhile, Mandarin Oriental no longer looks to have a minimum 15,000sq ft (1,394sq m) allocated to the spa and its new spas now fit the size of the property being developed.

But this doesn’t apply to all and individual hotel owners often think of the spa as a status symbol and that ‘biggest is best’.

An 80-bedroom Starwood hotel planned in western China has 12 treatment rooms; while a new Luxury Collection hotel in Shanghai includes a 1,000sq ft (93sq m) VIP spa suite.

SIMON SHEPHERDSON

Managing director,
International Leisure Consultants



You could ask if this is practical or sustainable, but what if the owners are using these facilities for business entertaining, as they increasingly do, and conclude a US\$30m deal this way?

Generally, the size of a hotel spa can be linked to the number of bedrooms and the potential capture rate – 5-8 per cent in city hotels and 10-15 per cent in resorts. In resorts, spa treatment rooms tend to be bigger – 400-500sq ft (37-46sq m) – to give a greater sense of escape, while 150-200sq ft (14-16 sq m) is adequate for a city location.

Do these different sizes create equal revenues? Smaller rooms, without showers and toilets but with a minimum size of 120sq ft (11sq m) for comfort, are suited to shorter, straightforward treatments so can gener-

ate greater revenues with quicker turnover. Yet double rooms, with a 180sq ft (17sq m) minimum, are increasingly important with spas being visited more often by couples, friends and business associates. Treatment rooms over 500sq ft (46sq m), however, are too large to allow for an intimate experience.

Good design can make treatment rooms seem larger and also to appear more lavish and it helps when spas are taken out of the basement to allow for natural light.

It’s difficult to reconfigure treatment rooms because of sinks and showers. But allowing additional space in the design gives some flexibility – an extra relaxation lounge planned early on can be turned into treatment rooms as demand grows. And if your rooms are already too big? Work with your marketing team to sell the size and create packages to promote this feature.

Don’t let the accountants win. A spa can be a good return on investment – though small (120sq ft) to medium (180sq ft) size treatment rooms are the most efficient.

Shepherdson set up ILC, which specialises in spa and club design across Asia, 15 years ago. Details: www.ilc-world.com

A spa can be a good return on investment – though small (120sq ft) to medium (180 sq ft) size treatment rooms are the most efficient

There are few standards for how much space should be allocated to spas and what components they should have. This can result in costly design faults ranging

from overbuilding to under-sizing. Common errors include lack of consideration being given to operational flow and back of house space (see S808/1 p76), the omission of facilities that would enhance the experience and incorrectly sized treatment rooms.

The size of treatment rooms varies considerably – I’ve seen rooms larger than 1000sq m (1,076sq ft) and as small as 6sq m (66sq ft). The larger rooms are more often in resorts where there’s less premium on cost per square metre. In my opinion, there’s no doubt that guests appreciate space in a treatment room, but once it exceeds a certain size satisfaction diminishes. In a single treatment room for example 12-16sq m (129-172sq ft) with a shower could be considered adequate. Our minimum is 20sq m (215sq ft) because we also allow for a seating area.

Frequently, however, the operator is not the one deciding the size and layout of the

ANDREW GIBSON

Group director of spa,
Mandarin Oriental



spa. Yet they’re left with working out how to generate sufficient revenue from the space.

Ideally, a rough treatment menu should be in place before allocating size. In this scenario, the operator will be able to include features such as a shower, steam shower, toilet and seating, enabling them to create treatments and packages that are sold at a premium. Spa suites – with such features – are suitable for multiple types of treatments and therefore present more revenue opportunities. They also enable operators to sell couples treatments (which are becoming very popular around the globe), or a premium service for individuals and couples, as well as an upgrade opportunity to regular guests. If there’s enough space, they can also be hired by groups on a time basis.

The optimum size of a treatment room is subjective as it needs to fit the concept of the spa. At Mandarin Oriental, for exam-

ple, we give designers a very detailed specification of what services we need to provide in the room and how big it should be.

That said, the size of the room is only one consider-

ation when it comes to luxury. The overall impression, attention to detail, placement of controls, lighting and safety features all add to the guest experience

There’s no magic formula for calculating the number of treatment rooms. We’ve used equations that focus on the number of hotel bedrooms, urban versus resort location, average length of stay and leisure versus business guests – but they’re guidelines at best. As a very loose rule of thumb, I would suggest one treatment room for 15-20 guestrooms. Then the anticipated hotel occupancy divided by 10 will give the number of treatments from in-house guests per day. Using both of these figures, you can roughly determine the number of treatment rooms.

Gibson oversees the operations of 22 spas worldwide in his role at Mandarin Oriental. Details: www.mandarinoriental.com

There are certainly more overbuilt spas than effective builds, especially in resorts and hotels where they know customers have the means to pay for that experience and luxury space.

This is changing though, as overbuilt spas become a burden on the books. Over the past year, we've seen resorts/hotels questioning the cost of support and upkeep of a spa, or even the need for one going forward.

I'm not convinced that larger treatment rooms command more money – while the novelty of something grandiose may work in the short-term, it's not a sustainable approach. And imagine telling your guest that, that was the reason why you're charging more: I doubt it would win them over.

In my experience, you can only charge more money if you offer an exceptional, exclusive or tailored experience. Yet as the majority of what the guest considers the paid-for experience happens in treatment rooms,

DAN SHACKLETON-JONES

President/partner
Niki Bryan Inc



experience in mainstream body and skin services. It's functional, provides storage, has enough room for therapist movement and is intimate enough to make the guest feel comfortable.

if you miss the mark on sizing you stand to miss the mark on aligning with the guest expectation. Brands are commonly articulated through a series of expressions and it's this environment that defines the experience and its delivery. Too small is the room that will not enable you to do this.

But too big is the room you cannot pay for. Space has an operating cost and a need to capture revenue to offset this. Do you want a massage room 24 x 24ft (7 x 7m) averaging US\$130 per services hour or two rooms 12 x 12ft (3.5 x 3.5m) averaging US\$260 an hour total? The cost of the space is almost the same, yet the limit on revenue can be very different for the oversized room.

Over 28 years, I've found that 12 x 12ft is ideal for profitability and our guest brand

What makes it profitable is the ability to consistently book and charge an appropriate service rate that will pay for all operating costs associated with the space while protecting the guest experience and ensuring a strong margin.

There are multiple formulas with variations on calculating the appropriate number of treatment rooms. And these depend on guest occupancy, average length of stay, number of bedrooms and capture rate. I'd suggest looking at existing properties in the immediate market that provide KPIs for you to consider. And above all, know your guest demographic and what services they demand. That way you won't get drawn into offering fad treatments or services that have little or no demand from your customers.

Over the past year, we've seen resorts/hotels questioning the cost of support and upkeep of a spa, or even the need for one going forward

Approaching 30 years in business, Niki Bryan is a leading US spa consultancy and management company which has a number of clients, including Disney.

Details: www.relaxedyet.com.

A big bug bear of mine is that owners and operators are being ill-advised by consultants – typically ex spa directors who've set up on

their own – who have no idea how to design a spa. I've picked up at least eight projects recently where the design is a complete mess for this reason. As an industry, we should have some kind of governing body for this.

Do I think spas are being overbuilt and aren't seeing a good return on investment? Yes is the short answer. But it depends entirely on how the owners are looking at yield – is the spa a complete standalone facility, or is it sharing expenses with the hotel? Do they take into account that the spa can boost hotel revenues at off peak times and out of high season? If not, spas probably won't achieve the figures they want and we'll be going back to spas with just treatment and changing rooms.

Do I think spas have too many treatment rooms? That's very difficult to answer, because I can give examples of where we

SUSAN HARMSWORTH

Founder and CEO,
ESPA International



As 60 per cent of our business globally is massage, we've started to reduce the number of multi-functional treatment rooms we include due to energy costs and space. Also as the stand-

ard of therapists has decreased, we've found they're no longer able to perform treatments and that they specialise in just one or two services such as massage or facials, or personal grooming/beauty. It's really important to design a spa with the treatment menu in mind at the start, but you do also need to think about the availability of practitioners. If you can't find suitably-trained staff for those treatments in the region, for example, then that will impact on design too.

For operators who already have too many treatment rooms, they could consider renting some out to high-end specialists – this has worked well for us in the past.

might have included too many. On several occasions, clients have requested big spas to cope with group business (sometimes renting out the whole hotel) to boost numbers in the off-peak season – in one case a client wanted 20 treatment rooms to cope with group business but was prepared to run only 12-14 for the rest of the time. Also, if spas are going to boost occupancy by 20 per cent at the weekend, then they might be able to justify having rooms empty in the week.

I'd say that a good size for a single treatment room for massage would be 14-16sqm (151-172sq ft), although that is on the luxury level because we build in storage for all equipment, products and linen. Anything bigger than that, then the client won't be comfortable, you'll be looking at high energy costs and you'll also need to increase the revenue generated.

Spa management and skincare company ESPA was founded by Harmsworth over 35 years ago. It has a portfolio of 250-plus spas in 55 countries. Details www.espaonline.com



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Elemis

Excellence in Education

Elemis, the leading luxury British Skincare and Spa Brand, unveiled a new brand vision and educational platform at Professional Beauty 2012.

Excellence in Education is a core part of the Elemis philosophy and a key service provided to our partners around the world. With a team of over 40 expert International Trainers and Spa Specialists and an online educational centre, we work with our partners to ensure each Elemis spa-therapy is performed to the same standard with the same passion for consistently high results.

International Trainers provide a comprehensive curriculum, giving each delegate an in-depth induction to the concepts and vision of the brand. Each therapist is taken through the Elemis journey from field to face, using hands-on peer learning to cultivate the sense of touch and client care. Through developing massage techniques, core treatment procedures and retail selling skills, they are given the versatility required for a fast-paced spa environment.

Elemis Spa Specialists combine expert sales and treatment techniques with confidence and passion in the brand. From consumer shows, trade exhibitions to local spa events, they are a dedicated team on-hand to support all areas of the business.

The Online Education Centre offers essential pre-learning prior to hands-on training courses and provides a central resource library for all Elemis products and therapies. This easy-to-use site is focused on continuous learning and development.



"Professional Beauty 2012 showcased our expert training programme and previewed our new anti-ageing skincare and spa-therapies, to be launched over the next 12 months.

Since 2010 we have provided a central online portal for our global therapists to learn, discuss and enhance their ability to offer the best in spa-therapy and retail sales to clients. We have effectively reduced training time by half but improved quality by double.

Elemis provides our retail and spa clients with cost-effective, thorough and innovative resources for the best training in the business."



Séan Harrington,
Elemis Managing Director

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DARRELL METZGER

To encourage more tourists to Malaysia, Destination Resorts is developing world-class luxury resorts and hotels, complemented by spas, theme parks and leisure attractions. We talk to the man in charge of pulling it all together

JENNIFER HARBOTTLE • JOURNALIST • SPA BUSINESS

Darrell Metzger has a twinkle in his eye. Mild-mannered and mischievous, his calm demeanour belies the task ahead of him. As chairman of the Executive Committee Board of Directors for Destination Resorts, Metzger is in charge of making sure his team delivers on its promise – to invest in and create world-class, leisure and residential developments for the Malaysian market. And to make them profitable too.

Destination Resorts is a subsidiary of Khazanah Nasional Berhad, the investment arm of the Malaysian government, tasked with developing industries that will benefit the nation's long-term economic interests.

Alongside its sister company, Themed Attractions, Destination Resorts is responsible for enticing more international travellers to Malaysia through the development of the country's leisure and tourism industry.

While Themed Attractions is in charge of creating entertainment facilities and attractions, Destination Resorts is providing the investment, development and management expertise for destination resort and hotel-related projects – all with spas – in the region. Although they're both run as separate companies with their own CEO, Metzger has a role in each of them, ensuring they leverage the opportunities between the two. He reports to Nadziruddin Basri, the managing director of Destination Resorts.

► Metzger reports to Basri (right) managing director of Destination Resorts which is part of the investment arm of the Malaysian government

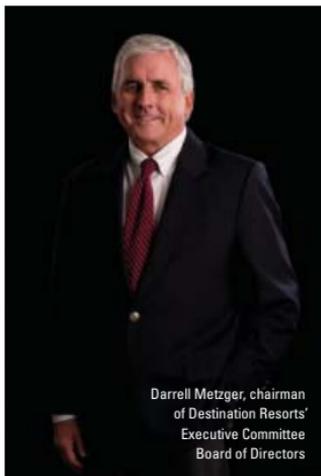
Spa tourism

Destination Resorts has three integrated leisure developments underway, all of which include resorts and hotels with spas. There are two in the southern region of Malaysia in the state of Johor, and one on the island of Langkawi (see opposite). And they've already attracted some of the top branded resort owners and operators around the world such as Amanresorts, Shangri-La and Sheraton.

Although the government's Economic Transformation Programme for tourism doesn't specifically include a focus on spas, Metzger knows Destination Resorts can't afford to ignore the importance of this market.

"Part of having great destinations is to have very well known, impressive spas," he says. "We know we need to build off Malaysia's natural assets to get people to come here rather than Phuket or Bali, so we'll make sure we have as good or better spa and recreation facilities as they have in those places." This could prove a wise move, considering that according to Metzger, over 50 per cent of the target market for its resorts will be from Europe and the Middle East, where people expect no less than a luxury spa as part of a five-star hotel.

This sentiment is echoed by Basri, who says: "Destination Resorts, as a developer of premier, integrated developments, will position Malaysia as an appealing and complete holiday destination of choice for all travellers. We



Darrell Metzger, chairman of Destination Resorts' Executive Committee Board of Directors

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► We need to get people to come here rather than Phuket or Bali, so our spa and recreational facilities will be as good or better

will bring out the best of our country's natural wonders and complement them with world-class leisure and tourism products."

To ensure it delivers, Destination Resorts is exploring joint venture opportunities with hotel partners which have a proven track record and which have a philosophy that's in line with the concept and positioning of its projects. As its goal is to become the lead investor in resorts and hotel brands in the country, Destination Resorts owns a "not insignificant" shareholding in each of the branded hotels being built.

In 2012, Destination Resorts also became the majority (51 per cent) shareholder in an existing hotel group called Archipelago Hotels & Resorts. The Asia-based company was established in 2010 and has four, five-star hotels with spas, which it owns and manages in Malaysia. They include The Datai Lang-►



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In the pipeline

DESARU COAST

The largest project to be managed by Destination Resorts is Desaru Coast in Johor, a 17km (11mile) beachfront integrated. The MYR3bn (US\$982m, €754m, £608m) development will include four luxury hotel and spa resorts, private houses for sale or lease, plus a retail mall, convention centre, two golf courses and three theme parks. The development of Desaru Coast is being carried out in three phases, with the first phase expected to open by the end of 2014.

The hotel and spa resorts will be a combination of one six-star branded property managed by Amanresorts International (the first Amanresort in Malaysia), one five-star branded Sheraton Hotel & Resort, and two five-star properties managed by Malaysia's Archipelago Hotels & Resorts.

Archipelago will own and manage the Datai Desaru Resort, which will feature 64 suites and 35 pool villas – plus one presidential villa – set on a hilltop away from the main attractions. It will also own and operate the 384-bedroom Plantation Hotel, which is a new hotel concept being created by

▲ A unique feature of Datai Desaru will be bedrooms looking out onto dolphins and fish in the marine park attraction

Destination Resorts and Archipelago that will sit in the centre and cater to the family and theme park market.

ISKANDAR MALAYSIA

Also in Johor, Destination Resorts is involved in a luxurious waterfront development being built by Themed Attractions called Iskandar Malaysia. As part of this, Destination resorts is partnering with Shangri-La to open a Traders Hotel. The 283-room four-star business hotel with spa is being built on top of a quayside lifestyle and retail complex adjacent to a family theme park. The site will also include the first LEGOLAND® Hotel in Asia.

TELUK DATAI

As a counter offer to the high-energy developments in Johor, Destination Resorts is also working on an integrated lifestyle resort at



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▲ The US\$982m Desaru Coast will be the largest resort for Destination Resorts. The first phase is due for completion by 2015

Teluk Datai, on the island of Langkawi. Destination Resorts plans to turn Teluk Datai into a high-end eco-tourism destination aimed at the couples' market and golfers, set in the rainforest, bordering the beaches. Here, Archipelago is refurbishing its existing 110-room five-star Datai Langkawi hotel, including its spa. It's also partnering with Shangri-La to open a 350-room beachside resort and spa, as well as looking for partners for two more six-star resort properties and private residences, all in time for a 2014 opening.

The nearby Golf Club Datai Bay is also undergoing an extensive upgrade.

INTERVIEW

► kawi, The Carcosa Seri Negara, The Club Saujana Resort and The Saujana Hotel Kuala Lumpur. Under the partnership, Archipelago will run hotels and spas for Destination Resorts where branded partners aren't involved. On top of this, Archipelago will retain its own identity and operate as its own company outside of Destination Resorts. Longer term, says Metzger, the plan is for Archipelago to grow its newly launched Datai Hotels & Resorts brand in other regions – something that will fit well with the government's objective of building quality Malaysian brands.

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Looking for investors

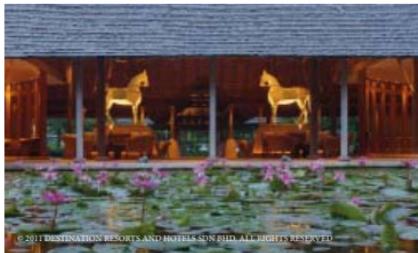
Although the resort developments are primarily being funded by Khazanah, Destination Resort's aim is to get private investors involved to operate them. Khazanah's total investment in Destination Resort's current portfolio is almost MYR7bn (US\$2.3bn, €1.8bn, £1.4bn) – one of the largest in the region for a leisure-based development. According to Metzger, the government doesn't need to run the developments as the principle shareholder, but isn't looking for an exit strategy just yet.

"When most developers sign a deal, they don't want to get involved with operations – they just want to buy, build and leave," he explains. "We're not doing that. We're building communities and we're committed to it." Having said that, a large component of the three current projects are residential properties and these will be developed and managed by the UEM Land Group, which also part of Khazanah.

▲ Archipelago already runs spas, such as at The Carcosa Seri Negara in Kuala Lumpur



► The goal is to turn the existing Datai Langkawi into a high-end, eco-tourism destination



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A land of opportunity

Metzger isn't fazed by what needs to be achieved. Although he regularly jokes about "getting too old for this" and pretends to be unsure about his position – "I forget what my role is here!" – you get the impression this is his way of taking the shine off himself and

giving the limelight to others. He's already proven himself a master of leisure development with the runaway success of Sentosa island in Singapore, which together with his team at Sentosa Leisure Group, he transformed from a tired looking island resort into Resorts World Sentosa – one of south-east Asia's top tourist destinations.

But his role at Destination Resorts is slightly different. It comes with the added challenge of bringing a new product to a market that isn't well-versed in high-end leisure offerings. On top of that, in creating a success of Sentosa, he's made his current job harder as he now has to compete with the well-visited tourist offering of Singapore as well as with the nearby and popular tourism destinations of Thailand and Bali.

While Malaysia is well known for its shopping and beaches, tourism is mainly focused around the city and city-based hotels, plus a few island resorts known mainly to backpackers who enjoy diving.

"People's perception of Malaysia is that it's underdeveloped and underutilised, but that is the great opportunity," explains Metzger. "We have all this land, friendly people and

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▲ A Teluk Datai development will be more peaceful and is surrounded by the rainforest



The current spa at Datai Langkawi will be refurbished and will sit alongside a new Shangri-La resort and spa

► **People's perception of Malaysia is that it's underdeveloped and underutilised, but that is the great opportunity. We have all this land, friendly people, natural resources and infrastructure... so now it's time for the fun stuff**

all the natural resources you need, as well as the infrastructure. The government has already put in the hospitals, shopping centres, schools, universities and some housing. So now it's time for the fun stuff – the entertainment and the places to stay.”

Metzger thinks the government's plans for the tourism industry will only benefit Malaysia. He says that creating resorts for people to come and stay will create jobs, stimulate tourism overall and do good things for this developing country.

Managing director Basri, is also keen to point out that Destination Resort is dedicated to delivering a long-term tourism plan. “We are committed to developing integrated destinations and introducing new, innovative attractions that offer a unique holiday experience for the whole family,” he says. “Our portfolio is diverse and will continue to grow as each project unfolds.”

Place managers

Metzger says the key to ensuring the success of each development and the brands within it, is maintaining the personality and standard of each one. While Desaru Coast and Iskandar Malaysia are high-energy destinations aimed at families, Teluk Datai is about relaxation and privacy, and this is reflected in the hotel brands in each location. Whereas the Sheraton Resort and the Plantation Hotel face directly out onto the entertainment offerings at Desaru Coast, in Teluk Datai, the private villas and resort hotels are nestled in the rainforest to offer guests reflection and peacefulness.

Metzger sees Destination Resort's ongoing role as ‘place managers’. By that, he means they'll make sure that “no Seven Eleven stores will open in the resorts... it may look less attractive before and after you exit the resort, but while you're inside it, it will be perfect.”

He explains: “If you're the landowner and you earn a percentage of rent from each hotel, retail area, restaurant, convention centre and golf course, you have the motivation to keep the resort looking and working right because that's what's bringing the money in. If a developer starts farming things off to third parties and gives them a free reign to operate it how they want – which is common – you lose control over standards.”

Metzger says, until they find a management company that can take over Destination Resorts' role to the right standards, they will remain in charge.

Ever the optimist, Metzger talks about when (not if) Destination Resort's developments will be a success. He concludes: “Malaysia's got such a lot going for it. It's the right time, the right place and we're the right company so this is an exciting time for tourism in the country.” ●



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THE LEARNING CURVE



As our industry grows, so does the array of spa management courses. But is the education on offer really in-step with the industry's needs? On the eve of the publication of a new global study into the state of spa management training, *Spa Business* launches a three-part series to investigate

The rapid growth of our industry – combined with the changing face of hotel spas from amenities to profit centres – has created a demand for business-savvy spa managers who can communicate effectively: not only with the feelings-oriented therapists who they manage, but also with the finance-oriented corporate managers who they report to.

Over the last decade, a wealth of universities, colleges and private training providers have responded to this need, either by developing dedicated spa management courses or by incorporating spa elements into existing business or management courses. However, while the proliferation of such courses has been rapid, it has also been fragmented, unregulated and largely not in consultation with the industry. The result is a melting-pot of degree, diploma, certificate

and short courses – aimed at both school-leavers and those already in work – that is not only confusing, but which according to many spa professionals still largely fails to meet the needs of the industry. “A lot of people ask me which course they should do, and I don't have a clue,” admits Samir Patel, managing director of Six Senses Spas. “What I do know is that there is an absolutely imperative need to create industry leaders, and for that we need proper management training.”

To gain a better understanding of what's out there – and how it can be improved –

While the proliferation of spa management courses has been rapid, it's also been fragmented, unregulated and largely not in consultation with the industry

the Global Spa & Wellness Summit (GSWS) has commissioned research organisation SRI International to conduct a study into spa management training worldwide, the results of which will be unveiled at the summit in Aspen, Colorado, this June. “The current system is a nightmare for anyone to make sense of,” says Anna Bjurstam, managing director of spa consultancy Raison d’Etre and one of the GSWS board members who pushed for the study. “First, we'd like to get an overview of what courses are out there and what, if anything, they have in common... and then get some kind of standardisation [by getting] the industry and training providers talking more.”

In this series, we aim to complement the SRI study by asking what educators and employers are doing to meet the shortfall of quality spa managers – and what they can do better. In part one, we look at the full-time degree and diploma courses aimed at those looking for entry-level spa management jobs.

DEGREE OF SUCCESS

Historically, spa managers have either risen through the therapy ranks or segued into the sector from other areas of hospitality. But with business acumen increasingly a basic requirement of the role, many employers have in recent years started to look directly to the universities to find their spa managers of the future – complete with degrees in hospitality, leisure, tourism or business administration. In turn, many of these schools have added spa elements to their degree programmes to cater for this new demand, albeit to varying degrees.



Spa modules are being added to hospitality degrees, but can these graduates cope with the day-to-day running of real spas?

PHOTO: SHOOTING STAR / GETTY IMAGES / SHUTTERSTOCK



One of the pioneers in this field is Cornell University's School of Hotel Administration in the US, which introduced a spa-specific module to its hospitality management offerings as far back as 1985 (SB10/1 p52). Today, students studying for bachelor's or master's degrees at Cornell can choose from three semester-long spa modules taught by industry stalwart Professor Mary Tabacchi, and can also opt to do their mandatory summer-break internships in the spa industry. But it's no longer the only university with the spa industry on its radar - other examples abound, from Florida Gulf Coast University and Arizona State University in the US, which offer degrees with a spa concentration and certificate extension respectively, to Les Roches International School of Hotel Management in Switzerland, which touches on spa more generally in their wider curriculums.

So what exactly can these young graduates bring to the spa management table? "Our biggest advantage is the strong business grounding that our students have to have before we turn them over to employers," says Tabacchi. Patel, who has recruited from Cornell, EHL and Les Roches, agrees. "These are highly educated, smart young men and women with a thorough understanding of hotel management, so we don't need to teach them the basics of our business,"



Cornell, US, introduced a spa degree module over 25 years ago. Its graduates have strong business skills and are encouraged to get operational experience

he says. "As the spa industry grows, we're going to need more managers, and what better time to groom them than when they're fresh from education?"

Despite this, many in the spa industry feel there is a disconnect between what these courses offer and the real world of employment, with new graduates ill prepared for the day-to-day challenges of running a spa, too inexperienced for corporate roles and subsequently unsure of where they fit in. "We have a difficult time recruiting hospitality graduates who haven't previously worked in the spa industry," says Bjurdam. "Unlike those specialising in rooms or F&B, they have not usually had any practical experience of working in a spa. Even if they choose to do internships as part of their course, they're typically only for two weeks, and often they don't want to do them in a spa. They're aiming for higher: corporate management or

consultancy. But we'll only take interns if they've worked in spa operations before their studies - otherwise there's really nothing they can do for us."

Tabacchi agrees her students sometimes have unrealistic expectations. "I urge anybody interested in corporate or consulting work to get some operational experience first," she says. "You never really get it until you've been in the trenches." However, even graduates with spa manager roles in their sights often find it difficult to get their foot in the door due to their lack of practical experience. "Too often the feedback from employers is that some people think that just because they've got a [management] degree they should be able to walk into spa management jobs," says Suki Kalirai, director of UK-based training provider the Carlton Institute and chair of British trade body the Spa Business Association. "But if they don't understand day-to-day operations, that's not always feasible."

Not everyone, however, thinks the fault lies with the universities. "I love what the universities are doing, and I've hired lots of people from Cornell," says Elaine Fenard, manag- ▶

INVESTIGATION

▶ ing partner of spa consultancy Spa Strategy and previously vice-president of spa operations for Starwood Hotels. "But graduates are not able to hit the ground running. There's no entry into spa... I've seen some people get a foot in the door by doing some modality training, or starting on the front desk, but that's a hard call when you've spent that much money on a degree."

Rather than blaming universities, says Fenard, the industry should work with educators to provide clearer career paths for graduates, as well as ongoing support – possibly through a postgraduate follow-up course or coaching or mentoring schemes. Patel agrees the industry could do more: "These are students who've only just graduated. They need a lot of support and guidance."

With this in mind, Six Senses has invested in a fast-track spa management trainee scheme for up to 10 graduate recruits a year. During the programme, the graduates spend a year shadowing and assisting a spa manager for a small stipend. After this, they join a pre-opening crew, before finally moving into an assistant spa manager role within the company. However, in contrast with other sectors of the hospitality industry – such as rooms or F&B – such opportunities for graduates in the spa industry remain rare.

BEST OF BOTH WORLDS

Although the lack of a clear career path for graduates is a problem, many spa employees believe that the universities themselves could also do more to prepare graduates for

"Rather than blaming universities, the industry should work with educators to provide clearer career paths for graduates, as well as ongoing support"

the real world of spa operations. As well as better management of expectations, says Bjurstam, there needs to be more vocational training. This means mandatory work placements of at least a month and more emphasis on practical skills, including not only 'live' business assignments in partnership with spas – something that's integral to Tabacchi's spa modules – but also hands-on training in massage and beauty therapy.

Raoul Andrews Sudre, founder of Florida-based consultancy Aspen Spa Management and the International Hotel Spa Academy – a training company helping government ministries in Morocco and Nicaragua develop wellness tourism strategies – agrees that hospitality degree courses do not provide enough practical training to turn out viable spa managers. "The academic institutions balk at the fact that hands-on is a very important part of the business," he says. "And until they recognise that and offer some training in that direction, the education they're offering is incomplete."

It's a divisive issue, however. "I don't think therapy training is needed," says Fenard. "How many CEOs know the technical detail of how the people on the ground provide serv-

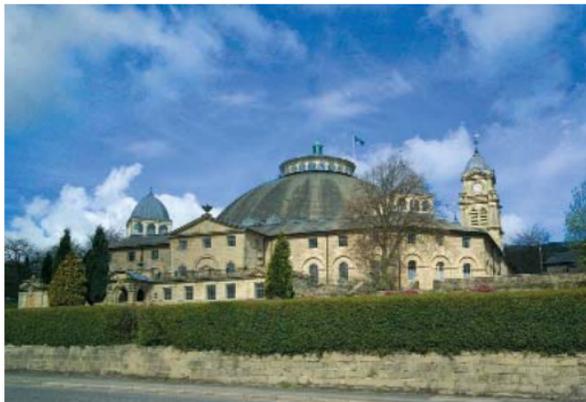
ices within the business? Success in spa depends on teamwork and that requires drawing on everyone's core competencies. Therapists provide a service that they train hard, and are qualified, for, whereas the role of a leader is to lead. The most important quality in a spa manager is the business acumen that comes with a college degree."

The ideal solution, believes Tabacchi, is a degree programme that combines MBA-level business input with vocational skills in massage, beauty, health and healing. While there are certificate and diploma courses offered by colleges in North America that combine therapy with management training, all too often the business education they offer is insubstantial. "They may get an adjunct professor to talk about basic accounting or marketing," she says. "But that doesn't get you through in today's business world."

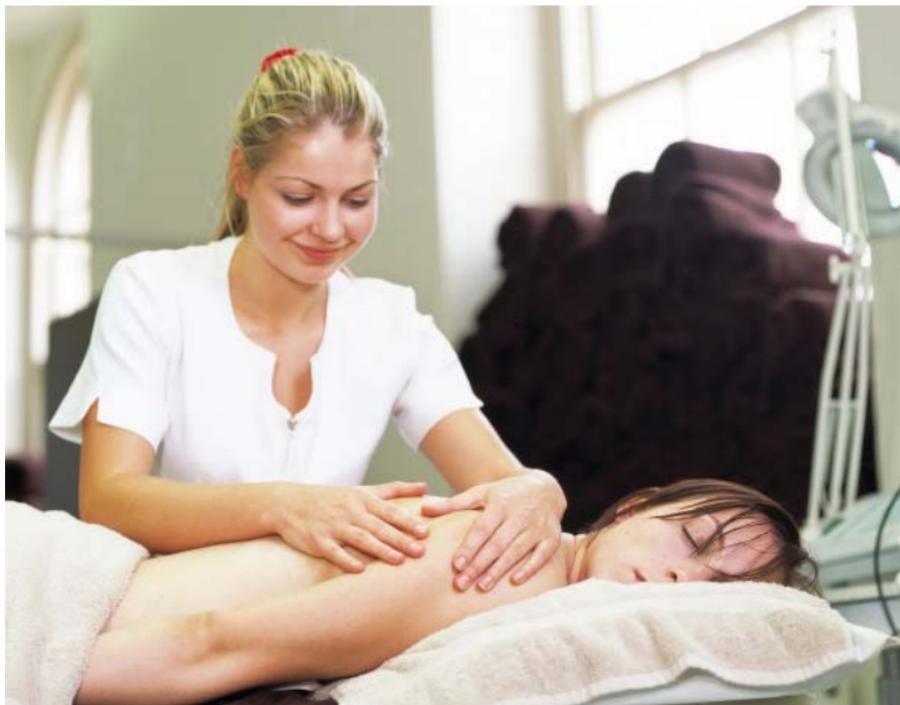
Across the Atlantic, the landscape is a little different, as the last decade has seen the introduction and rise of a number of dedicated spa management degrees, offered by UK universities in particular. Yet even within this emerging niche, there are huge variations in the ratio of vocational versus business education on offer. University College Birmingham, for example, offers a three-year bachelor's degree in spa management with hospitality that includes no vocational training, in contrast with a number of two-year foundation degrees offered by other UK institutions, which focus predominantly on practical skills with some basic business classes thrown in.



Derby has an on-site commercial spa to help students with crucial operational skills



The University of Derby Buxton, UK, launched its international spa management degree in 2001



One UK degree programme that does strive to achieve the best of both worlds is the course in international spa management at the University of Derby Buxton – the first of its kind in the UK, if not the world, when it was launched in 2001 (S805/4 p60). The programme currently has an intake of 60 students a year, who can choose to complete either a two-year foundation degree or a three-year bachelor's degree. According to course leader Isobel Stockdale, around half go on to the final year, and around 20 per cent of all students come from overseas.

The course at Derby certainly appears to be equally split between business and vocational training, with modules ranging from strategic management and international spa design and development to massage techniques and balanced nutrition and spa cuisine. And when it comes to performing treatments, students are expected to reach a commercial level of competency by the end of year one. But why do they need these skills if they're not planning on becoming therapists? "Spa managers sometimes have hands-on responsibilities, and [therapy training] enables them to understand and develop the staff they're managing," says Stockdale firmly. "It helps them to under-

stand client care and the importance of touch during treatment, and enables them to trade-test staff effectively."

EXPERIENTIAL LEARNING

What really sets Derby apart is its on-site, commercial spa – supplied by Elemis, Dermalogica and Dalesuana – which is wholly operated by the students. Every student is required to do at least one six-hour shift in the spa each week, in addition to any external work placements, and over the course of the programme they have the opportunity to take on a variety of roles, from receptionist, attendant and therapist through to marketing manager, HR manager, financial manager and assistant spa manager. The spa manager – a recent graduate of the university's masters programme in international spa management – and two trainers are the only paid professionals.

The spa not only gives the students plenty of hands-on experience, says Stockdale, but also puts all the business and management knowledge they're assimilating into context. "A lot of our assessments are designed around real case studies or activities in the spa, rather than something from a textbook," she says. "It's very much experiential learn-

Derby university seems to have got the mix between business and practical skills right. It enrolls around 60 students a year and many have been employed by top spas worldwide

ing – they learn by doing and reflecting, then putting it into practice again."

Jane Crebbin-Bailey, partner of international spa consultants HCB Associates and a visiting lecturer at Derby, agrees. "It's all very well [teaching management theory], but to really understand how to manage therapists you need to actually do it," she says. "I think that's the key to success for spa management training courses – they have to have a spa."

The end result, says Stockdale, is graduates who are ready and able to work. Many have subsequently been employed by leading companies – including global players such as Danubius, Mandarin Oriental, Sofitel and Hilton – and frequently rise to spa manager roles, albeit after an initial stint as a therapist or supervisor. Stockdale would like to see employers provide clearer career paths for her students, however, believing that most would feel happier about starting at the bottom if they were assured of a quicker progression up the ranks. ▶

INVESTIGATION

“While the West already has a tertiary educational structure in place, it’s different in other parts of the world where newer spa markets are growing most rapidly”

- ▶ Although Derby has been a trailblazer in integrating vocational spa training into a management degree, it’s no longer the only university in the region to do so. Warwickshire College, also in the UK, offers a two-year foundation degree in spa management with a strong emphasis on both management education and hands-on skills. Crucially, it not only stipulates that students get a vocational therapy qualification before they apply; but also that they complete at least 400 hours of work experience – and like Derby, it also has an on-site commercial spa. In Ireland, the Athlone Institute of Technology offers a three-year bachelor’s degree in spa management with modules ranging from financial accounting, HR and revenue management through to massage, complementary treatments and spa tourism. It also includes a mandatory six-month work placement.

EMERGING MARKETS

Although the UK seems to be leading the pack when it comes to dedicated spa management degrees, an increasing number of universities in mainland Europe are also moving into spa in a big way – from the University of Tartu Pärnu College in Estonia, which has launched a two-year masters degree in wellness and spa service design and management, to Turku University of Applied Sciences in Finland, which headed up a pan-European research project to develop four extensive spa management modules that can be incorporated into tourism and hospitality degree courses on an ad hoc basis as well as accessed online (more of that in part two).

But while the West already has a tertiary educational infrastructure in place to meet spa management training needs – albeit one that’s rather piecemeal – it’s a different story in other parts of the world, especially in newer markets where the spa industry is growing most rapidly. Vanessa Main, director of spa operations and development for Hilton in the Asia-Pacific (SB11/3 p28) says: “If you look at America and Europe and even Australia, those regions have now got some quite solid educational solutions available at universities and elsewhere. In Asia, that is still somewhat missing.”



The Ananda Spa Institute, India, is leading the way in Asia with its spa management diploma course that’s certified by international examination boards CIBTAC and ITEC

It’s inevitable, then, that emerging markets are already looking for alternative solutions to university or college education to meet the increasing demand for educated spa managers. Nowhere is this truer than in India, where commercial academies set up by top spa operators – initially to meet the need for trained therapists – are now offering full-time spa management diploma courses. Among the highest profile of these are the Ananda Spa Institute – a subsidiary of IHHR Hospitality, developed in consultation with spa consultant Crebbin-Bailey (SB08/3 p36) – and the Orient Spa Academy,

which is a subsidiary of the Neesa Group. Affiliated with international examination boards CIBTAC and ITEC respectively, these academies may not be able to offer the in-depth business content or international clout of a degree – but they are meeting a growing need for focused spa management education in the region.

For anyone looking for a full-time degree or diploma course to get them started on a career in spa management, one thing is certain: the number and diversity of options out there is truly overwhelming. If the forthcoming results of the SRI study can start to make sense of the picture, for both spa employers and aspiring employees, that can only be a good thing. ●

In part two: we look at the management training options for those already in work, from therapists to career-changers



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Closer Look

Leonor Stanton drills down into PKF's latest US hotel spa industry figures and gauges the industry's response

LEONOR STANTON • CONTRIBUTING EDITOR • SPA BUSINESS

Trends* in the *Hotel Spa Industry 2011* by PKF Hospitality Research (PKF-HR) gives an in-depth report on how the US hotel spa industry fared in 2010 and what lessons owners and operators can learn from this moving forwards.

Now in its fifth year, the 2011 report is based on the largest sample yet – 151 properties, of which 64 per cent (97) were resort and 36 per cent (54) were urban hotels.

At an average of 14,646sq ft (1,361sq m), the resort hotels are 80 per cent larger than urban hotels and offer an average of four more treatment rooms, as well as other non-revenue earning amenities.

It's important to note that unlike hotel EBITDA, spa departmental income in this report is before undistributed expenses – such as marketing, utilities, maintenance and administration – and fixed charges such as finance charges are taken into account.

KEY FINDINGS

As with previous years (S811/2 p32), findings show that larger properties achieve significantly higher revenues and departmental income per square foot, particularly when analysed by spa turnover. Hotel spas with revenues of over US\$3m and an average of 22 treatment rooms generate US\$144 (£111, £89) per square foot and US\$43 (£33, £27) in departmental income – representing 30 per cent of turnover. The smaller spas, with revenues of under US\$1m, generate a departmental profit of 16 per cent, US\$77 (£59, £48) and US\$12 (£9, £7) in departmental income per square foot.

This is to be expected according to Mary Tabacchi, associate professor of spa develop-

ment and management at Cornell University, who regularly contributes to the report. She says: "The fact that those resorts with an average of 22 treatment rooms tend to make more money on a per spa basis is likely as they have a captive guest; a guest who has time to use the spa – and who in fact may plan to spend money in the spa as part of their vacation experience – these guests are there for leisure and for a longer time. In the smaller urban spas, hotel guests tend to be there on business: they're not likely spa goers – they are usually there for a short period of time, do their work and head home. They're also likely to be travelling alone".

However, when analysed by square feet, it's the smaller spas which have a higher revenue and departmental profit (see Table 1). This is significant for investors as these spas are therefore likely to have a higher return on investment levels. Tabacchi adds, "the reason smaller spas often do better on a per square foot basis is because there is less 'non-revenue' space – few luxurious spa lobbies and relaxation rooms." The profit conversion of smaller spas is nevertheless lower than the larger ones – 19 per cent versus 25 per cent when measured on a square foot basis.

Interestingly, the middle-sized spas – those which PKF-HR categorises in the US\$1m-3m turnover category – appear to have suffered the most in 2010. When measured on a per treatment room basis, this middle category saw revenues decline by 14.3 per cent. In comparison, larger spas (with revenues of over US\$3m) had an 8.8 per cent drop in revenue and smaller spas (with revenues less than US\$1m) only suffered a 1.9 per cent decrease.

Middle-sized spas in the US\$1m-3m turnover category appear to have suffered the most in 2010... and when analysed on the number of treatment rooms, declines are even more significant

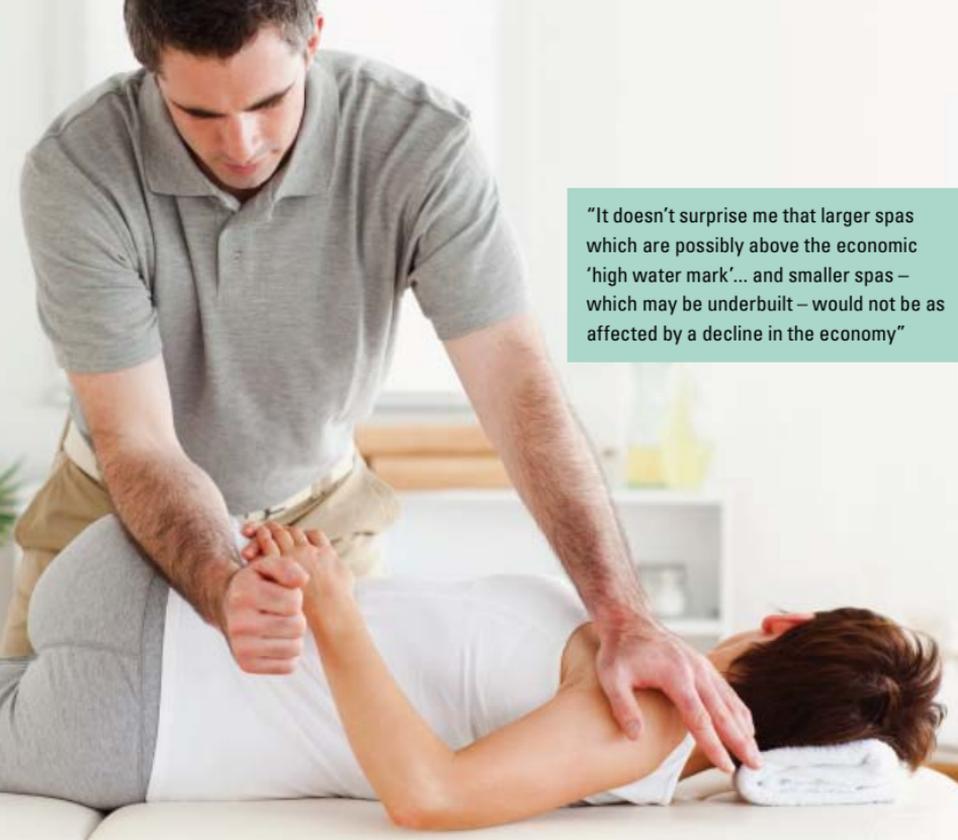
Resort spas with more treatment rooms make more money on a per spa basis, but smaller spas have higher revenue per square foot

Furthermore, middle category spas also showed departmental profit declines of 38.9 per cent compared with a 13.1 per cent fall and a rise of 1.0 per cent for the larger and smaller spas, respectively. This is partly explained by higher payroll costs in the middle category: US\$74.14 (£57, £46) spent on payroll per square foot, compared with US\$71.53 (£55, £44) in the larger spas and US\$46.60 (£36, £29) in smaller spas.

When analysed on the basis of the number of treatment rooms, the declines in the middle category are even more significant. At departmental profit level, the middle category (10-20 treatment rooms per spa) experienced declines of 46.5 per cent, compared with an increase in profits in both the larger (up 8.1 per cent) and smaller (up 4.8 per cent) spas.

OVERBUILDING IN SPAS

PKF-HR attribute the decline in the middle-sized group in part to possible overbuilding. They believe that "medium-sized spas are often found in hotels that likely should



“It doesn’t surprise me that larger spas which are possibly above the economic ‘high water mark’... and smaller spas – which may be underbuilt – would not be as affected by a decline in the economy”

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TABLE 1: REVENUE AND DEPARTMENTAL PROFIT ANALYSIS 2011 SURVEY*

Per square foot values	SIZE OF SPA			SPA TURNOVER		
	Spa sq ft > 15,000	Spa sq ft from 6,000 to 15,000	Spa sq ft < 6,000	Spa revenue > than US\$3m	Spa revenue US\$1m - US\$3m	Spa revenue < US\$1m
Total spa revenue US\$	112.85	106.85	210.96	144.28	126.88	76.67
Departmental profit US\$	28.47	21.73	40.13	43.38	28.11	12.18
Departmental profit %	25.2%	20.3%	19.0%	30.1%	22.2%	15.9%

*Source: PKF-HR, based on 2010 figures

have a spa as a guest amenity, but the property is not specifically known for its spa facility or experience. Therefore, it is neither an intimate, boutique spa nor is it a grand showcase spa for the property’s marketing and reputation.

“Additionally, the spa facilities may have also been built as a ratio of spa treatment rooms to total guestrooms, rather than built to an actual projection of hotel spa demand and capture [rate]. Either individually or combined, these factors result in a greater potential negative impact on spa revenues during recession and early recovery periods.”

Elaine Fenard managing partner of consultancy Spa Strategy agrees that it’s possible to overbuild, saying she would “never recommend that a spa be built simply as a ‘guest amenity’... we would recommend against development unless there is a strong business case for the spa alone. Spas should always be a profit centre, however small. Along with the spa economics, the benefits to the hotel also need to be considered.”

Although more research needs to be undertaken on the value of spas to the hotel business itself, it’s clear as Jeremy McCarthy, director of global spa operations and development at Starwood Hotels & Resort, says,

“sometimes the value of the spa transcends the numbers that appear on the bottom line... hotel operators have to look beyond the metrics of the spa to what a spa does for the rest of the hotel: does it improve ADR? Does it attract leisure, wedding and honeymoon travellers? Does it attract group business? Does it create more awareness of the hotel in the local community through day spa use? There are lots of factors to consider.

“It doesn’t surprise me that larger spas which are possibly above the economic ‘high water mark’ and less affected by the fluctuations in the economy, and smaller spas – which may be underbuilt – would not be as

In 2010, the larger spas, with revenues of over US\$3m, reduced their total labour and operating expenses by 7.7 per cent... middle and smaller-revenue spas only cut total expenses by 2.8 per cent

affected by a decline in the economy," he says. "This doesn't necessarily mean that medium-sized spas are overbuilt. The facilities in these medium sized spas have also allowed many of them to cater to a local clientele in a way that they couldn't if they were merely designed to serve as a hotel amenity."

Tabacchi adds: "Departmental income from spas is small compared with room sales – so that needs to be kept in perspective also when considering this. After all, if spas increase ADR they may pay for themselves in that way. And there is another theory that people who go to the spa also spend more money elsewhere in the hotel."

Turn to p26 to read *Spa Business'* investigation on the overbuilding of spas.

SPA DIRECTOR IMPORTANCE

In the face of declining revenues, all spas have been cutting expenses. In 2010, the larger spas, with revenues of over US\$3m, reduced their total labour and operating expenses by 7.7 per cent. This is significantly more than the middle and the smaller-revenue spas where total expenses were cut by 2.8 per cent in each category.

PKF-HR attributes these variations partly to differences in management expertise. "Larger spas with greater revenue streams can afford to carry the expense of a seasoned spa director, while smaller spas often do not have that luxury. Therefore, expenses may be more carefully and creatively managed in larger hotel spas."

However, McCarthy says: "[although] it is difficult for smaller spas to afford a manager who has all of the skills and experience necessary to master all of the complexities of the spa operation, hotels can overcome this by bringing other resources to support the spa, for example, having the hotel's marketing, PR and sales teams helping to build

the business and not expecting a junior manager to do this while also managing the staff, controlling costs, etc."

Fenard feels education and training are key industry challenges: "There's a gap in educating spa directors. As an industry we need to consider how to address this. How we mentor and support junior spa directors and managers will ultimately dictate how our spas operate as profit centres."

Tabacchi agrees: "Experience and business education alone are not predictors of good management. We have spa schools that teach technique but not much business and universities that teach excellent management theory but not much technique. Strong business students may not understand how an excellent practitioner works, while those interested in being practitioners may not be interested or have the aptitude for a strong business curriculum. In summary, increasing management ability is not well studied."

Spa Business explores the state of global spa management education in depth on p38.

SHOWING PROFITABILITY

Although overall spa profit levels declined in 2010 by 27.4 per cent, there was an improvement in the number of hotel spas which show positive profitability and above average profit margins (see Table 2).

The departmental profit of hotel spas as analysed in the PKF-HR survey ranges from US\$99,000 (€76,000, £61,300) on average per spa for those spas with revenues under US\$1m to a departmental profit per spa of US\$1.2m (€0.9m, £0.7m) for the larger spas

MONKEY BUSINESS IMAGES / SHUTTERSTOCK.COM

Larger spas are more likely to be able to afford a seasoned spa director so can manage expenses more carefully and creatively

with turnover greater than US\$3m. The profitability of the smaller spa is therefore relatively low once undistributed expenses and fixed charges are deducted. Every *PKF-HR Trends** in the *Hotel Spa Industry* survey has shown that smaller hotel spas struggle to convert revenues into profit.

FUTURE CHALLENGES

It is widely reported that 2011 was a better year for most spas. The 2011 *ISPA US Spa Industry Study* (SB11/4 p38) which surveys all spa sectors, shows average revenues for the resort/hotel sector to be US\$1.461m (€1.1m, £0.9m). This is not too different to the average revenue reported in the 2011 *PKF-HR* survey – US\$1.4m (€1m, £0.8m).

Colin McIlheney, global research director at PwC, who conducted the ISPA study says: "When asked about the trend in profitability, resort/hotel spas responding to the survey were more likely (64 per cent) than other spas (49 per cent) to report an increase in profitability when comparing the six months of September 2010 to March 2011 to the same period in the previous year."

But it's clear, nevertheless, that many spas are yet to see profits increase and that improving overall profitability remains a major challenge for the industry against the backdrop of a fragile economy. ●

*The full Trends** in the *Hotel Spa Industry 2011 report costs US\$295 (€226, £185) and can be purchased at www.pkf.com/store or by calling +1 866 842 8754.*

TABLE 2: PROFITABILITY OF CONTRIBUTING HOTELS – NUMBER OF HOTELS*

	Year	Spa Department Profit		Departmental Profit Margin	
		Negative	Positive	Below Average	Above Average
Resort	2010	9	88	81	16
Resort	2009	11	86	89	8
Urban	2010	5	49	39	15
Urban	2009	12	42	39	15

*Source: PKF-HR

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comfort zone

Italian spa brand Comfort Zone has earned an international reputation for high-end products that combine scientific results with sustainability, and commercial success with a unique, value-based philosophy. President and CEO Davide Bollati shares his vision

When and how was Comfort Zone created?

My mother and father founded our parent company the Davines Group in Parma in 1983 to research and develop hair and skincare formulas for private-label brands, and the laboratories they created are still the life force of what we do. I studied pharmacy in Italy and the US before joining the family business, and it became my dream to create our own brand. In 1992, the same year my parents handed me the reins to the company, we launched Davines haircare products. But after travelling widely in Europe and Asia, I also saw a gap in the market for a skincare brand that incorporated the results-oriented approach of the leading French and American product houses into a truly holistic experience that made customers feel as well as look beautiful. Using this as our foundation, we brought Comfort Zone to the market in 1996.



President and CEO Davide Bollati

Where do you distribute your products?

We distribute in over 50 countries, and are proud to work with some of the world's top spas, from the Bellagio Spa in Las Vegas, the Well Spa at Miramonte Resort, California,

and the Adlon Spa at the Kempinsky Berlin to spas at the Berkeley Hotel in London, the Westin Beijing, the Conrad Tokyo and the Park Hyatt Seoul. However, our clients are not only five-star hotels and destination spas, but also urban day spas and high-end beauty salons, such as Spa Utopia in Canada, Ena Salon in London and Soul Space in Florence. We believe the spa experience is not about dimensions – it's about quality of service and results. When we find partners that share this vision, the potential of Comfort Zone in their hands is limitless.

How would you sum up the Comfort Zone brand?

I would use just two words: experience and results. Our goal with everything we do is to ensure the guest's complete satisfaction. This means not only making sure that our formulas deliver the most advanced and effective solutions to their specific problems,

but also that the space, service and sensory experience are as pleasant and memorable as they can be. For the spa operators that we work with, we promise constant improvement and innovation, while also making sure they have everything they need to grow their business successfully.

What does that include?

As well as supplying products and treatments for our clients, we provide them with tailored training solutions covering our in-depth consultation process, our products, our signature rituals and retail sales. If needed, we can also provide design solutions,



Comfort Zone supplies some of the world's top spas such as the Bellagio Spa in Las Vegas



The Comfort Zone team at the Davines headquarters, Italy (left); Comfort Zone also prides itself on making its spa space (including retail areas) service and sensory experience as memorable as possible (below)



The Sacred Nature organic line (above) launched in 2009 – it is 99 per cent natural but also stands out because of its effective results



“ Our ultimate aim is not to be the biggest company in the world, but to be the most beautiful and ethical ”

supply furniture and accessories for our own range, create treatment menus and advise on operations.

You also offer a Comfort Zone-branded spa concept. How does this work?

We currently license the Comfort Zone brand to 12 spas worldwide – the majority are in Italy, but we also have sites elsewhere in Europe as well as in Central America. These partners are fully committed to our vision of serious, results-oriented skincare combined with a unique, contemporary Italian style. This means that in addition to supplying them with products, treatments and education, we work with them to design and furnish the space, as well as helping them with all aspects of day-to-day

operations. In some instances we manage the facilities and in others we consult, but what all our branded spas have in common is that their operators share our value system. We look for a meeting of minds.

Can you tell us a bit more about your products?

All of our products are rich in natural, active ingredients and free from parabens. One of our bestselling ranges is Action Sublime, a unique chronobiology system that releases retinol into the skin only when it's needed, thus avoiding adverse reactions and overload. Another top-seller is Skin Regenis, a patented skin longevity system that stimulates youth-preserving proteins called sirtuins. Being Mediterranean, we also have a strong focus on body care, and offer

a complete cellulite range comprising both creams and transdermal patches.

Do you have an organic line?

Yes. We launched our organic line, Sacred Nature, in 2009. The formulas are 99 per cent natural, yet what really sets the range apart is how effective it is. In fact, our Sacred Nature anti-aging cream achieves the same wrinkle reduction (-14 per cent wrinkles) as the equivalent cream from our Action Sublime range – it just takes a few more days. We like to say that Action Sublime is like travelling by plane, while Sacred Nature is like travelling by boat. It takes more time, but it's a lifestyle choice. The line is certified organic by Ecocert, and has won the Marie Claire Prix d'Excellence de Beauté twice: in Italy in 2010 and in South Africa in 2011. ▶



Comfort Zone distributes to over 50 countries and has offices in New York

“Our focus for 2012 is the launch of a totally new concept that will go beyond cosmetic products to make a real impact on the health and wellbeing of guests”

► **As a company, you have written a 'Carta Etica', or ethical charter, outlining your commitment to sustainable and ethical development. What was the thinking behind this?**

Over 100 of our staff worked with the philosopher Alberto Peretti over several months to develop our Carta Etica, and it goes to the heart of what we are about. The charter is based on the Aristotelian philosophy of eudaimonia, or human flourishing, and the belief that work can play an important part in helping us to lead happier, more fulfilled lives. Using art, literature and architecture as springboards for discussion, we came



All raw ingredients are sourced ethically and all packaging is eco-friendly

up with a collection of professional values, ranging from responsibility and cosmopolitan relationships to beauty and excellence, and we work hard every day to make sure these values are reflected in everything we do. Our ultimate aim is not to be the biggest company in the world, but to be the most beautiful and ethical.

Can you give some practical examples of your commitment to sustainability?

Sustainable practices are embedded in our culture. We source all our raw ingredients ethically, all our packaging is eco-friendly, and across the company we have 22 different projects aimed at reducing our impact on the environment. These include our Lifegate Energy project, a company-wide initiative that aims to produce 100 per cent of our energy from renewable resources. In addition, for our Sacred Nature and Aromasoul lines, we also have our Lifegate Zero Impact project, which supports reforestation initiatives to compensate for carbon dioxide production. In addition, last February, we hosted our second Sustainable Beauty Day

in both Italy and the US. On this day, 400 of our partner spas offered complimentary treatments for one day only in return for donations to environmental causes.

What's next for Comfort Zone?

Our focus for 2012 is the launch of a totally new concept that will go beyond the topical application of cosmetic products to make a real impact on the health and wellbeing of our guests. Working with medical experts – including a cardiologist, dermatologist and nutritionist – we have come up with a concept that combines lifestyle counselling with a range of cutting-edge nutritional and cosmeceutical products to deliver not only optimal skin health but also a healthier mind and body. I've been working since my university days on skin-related stress and anti-ageing, so I'm excited to co-ordinate a project that brings different sciences together in a unique and innovative way. More and more people are looking to spas not only to help them fight wrinkles, but also to help them live better lives. We believe it is our responsibility to help the spa professionals we work with to meet those needs. ●



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Susie Ellis

Influential spa commentator Susie Ellis has an uncanny knack for predicting the industry's future. On the sixth anniversary of the Global Spa & Wellness Summit she helped pioneer, the SpaFinder president explains what drives her

RHIANON HOWELLS • CONSULTING EDITOR • SPA BUSINESS

Anyone who spends just a few minutes talking to Susie Ellis will know that she's a consummate people-person: unfailingly warm and courteous.

They'll also recognise how passionate she is about the spa and wellness industry she champions, both as president of SpaFinder – the sector's largest marketing and media company – and as a founding board member of the Global Spa & Wellness Summit (GSWS). But if they delve just a little deeper, they'll also find something edgier: a sharp business mind underpinned both by pragmatism and an ability to think laterally.

Nowhere is this more apparent than in SpaFinder's annual *Spa Trend Report*™, which has won Ellis a reputation as a soothsayer since the first one was published nine years ago. Over the last decade, she's frequently been on target in identifying up-and-coming trends, including spa lifestyle real estate

(2005), sleep health (2007) and wellness tourism (2009) – so much so that, today, its publication is eagerly awaited by both the consumer press and the industry.

Bird's eye seat

Part of what gives Ellis her perspicacity, she believes, is her long career in the spa industry. She began her journey in the 70s as a fitness instructor at California's Golden Door destination spa, where she quickly progressed into management. After leaving, she worked as a consultant and got an MBA from the University of California Los Angeles, before working as an assistant to two consecutive International Spa Association presidents. Then, in 1995, she was recruited by Donald Trump to open and manage his first spa at The Mar-a-Lago Club in Florida.

By that time, she was happily married to Pete Ellis – now SpaFinder's chair and CEO – who she had met at the Golden Door (she was staff, he was a guest). In 1995, Pete

launched the pioneering online car sales and marketing company Autobytel and when he took it public in 1999, the couple started investing in a number of different companies – including a New York-based travel agency and magazine publisher called SpaFinder.

Today, SpaFinder is no longer a travel agency, although it works with over 25,000 travel agents. Instead, it promotes spa and wellness experiences direct to the consumer through its website, vertical search technology, reservation system and gifting programme. More than 25,000 wellness-focused consumers visit spafinder.com each day, and over the last few years, the company has also launched sister sites in the UK, France, Germany, Italy, Spain, Canada and Japan. It's this global perspective, believes Ellis, that is her other great advantage when compiling the annual trends report. "We have a sort of bird's eye seat here at SpaFinder," she says.

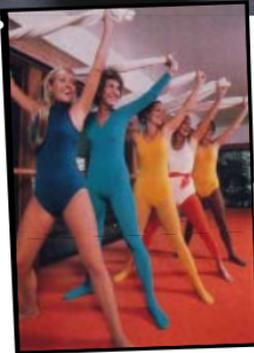
In fact, it was a vision of creating greater unity in the global industry that motivated Susie and Pete – along with a small group of leading spa professionals – to launch the Global Spa Summit (now the Global Spa & Wellness Summit) in New York City six years ago. Although many of the founding members are still on the board, it's Ellis who's been the driving force behind the initiative and annual conference.

Shining a light

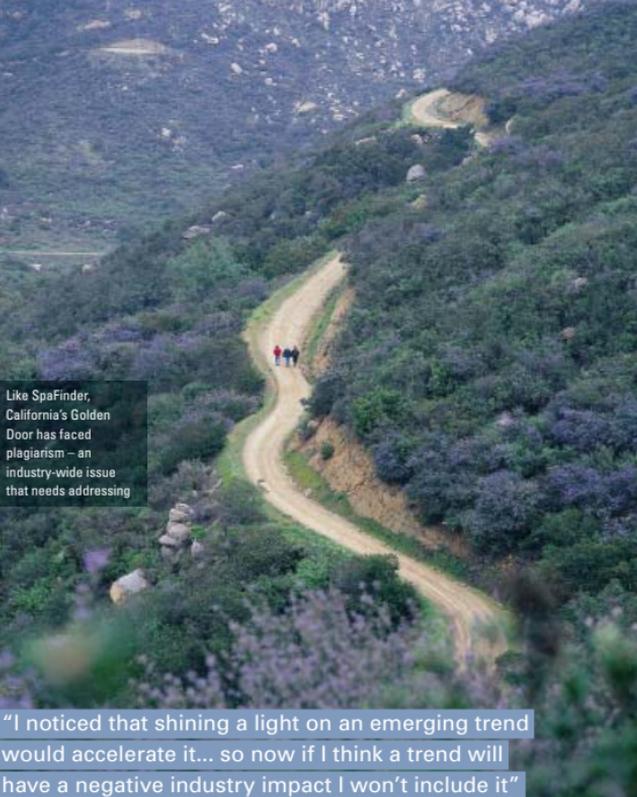
Although much of Ellis's time is taken up by the GSWS, she's still the face of SpaFinder and remains very involved

Over the past decade Ellis has frequently been on target in predicting trends such as lifestyle real estate (far left) in her annual *Spa Trend Report* (inset)





Ellis (front) was a fitness instructor at Golden Door in the 70s and feels her long career in spas greatly helps with predicting trends



Like SpaFinder, California's Golden Door has faced plagiarism – an industry-wide issue that needs addressing

"I noticed that shining a light on an emerging trend would accelerate it... so now if I think a trend will have a negative industry impact I won't include it"

in the business – especially in the annual trends report. "We do three studies a year at SpaFinder, one with consumers, one with the industry and one with travel agents, which gives us a lot of information," she says. "We can also see from our website what's trending. Finally, we have a team who travel to spas all over the world, and I count on their input. Personally, I always keep a notebook on me to jot down trends to track."

What sets SpaFinder's report apart from others is the focus on emerging trends – such as wellness gaming on the 2011 list (see p80) – rather than established ones. "To make those sorts of predictions, you have to do a fair amount of research," she says "and that means reading a wide variety of newspapers and publications, going to [non-spa] conferences like TED and TEDMED, and talking to many people around the world about what's going on."

As a result of such intense interest, the list is no longer only identifying emerging trends – it's also driving them. Ellis says: "I noticed maybe four or five years ago that shining a light on an emerging trend would

oftentimes accelerate that trend. So now one of the things I consider is what's good for the industry... and if I think a trend will have a negative impact, I won't include it."

Another reason a trend might not make the cut is that it's too early in its evolution. "One that didn't make it this year is the trend for spas to make their facilities and programmes available to the disabled," she says. "It's a small niche, but it's increasing and it really dovetails into one of our trends from last year, which was pain relief for the ageing, so we're watching that."

A third consideration, says Ellis, is making sure they're consumer-friendly. "That happened this year with employee wellness [the trend for corporate wellness programmes]," she says. "That's a very interesting opportunity for the industry, but we didn't feel consumers could relate to it yet; it's too soon. So we put it in at number 11 as a bonus trend."

An ethical challenge

The popular success of the SpaFinder *Spa Trend Report* has inevitably led to it being widely quoted in both the consumer and

industry press, as well as referenced by other experts. Yet while this kind of publicity is good for both SpaFinder and the industry, there is also a downside to the report's ubiquity. "A few years ago, we started seeing other people in the industry putting together their own trends lists," says Ellis. "And we noticed that many of these lists were basically our list. It would maybe have a slightly different name or a slightly different order, a little bit of cosmetic work to make it look new. But it really wasn't new."

"There's a lot of work involved in compiling our trends report, so a couple of years ago we decided we had to step up and start protecting our copyright. Since then, our lawyers have sent out a fair number of letters to people [trying to pass off the trends we identified as their own]."

Plagiarism is not a problem unique to SpaFinder, however. According to Ellis, it is an industry-wide issue, with numerous spa operators, consultants and suppliers apparently believing that the creative work of others is theirs for the taking. As an example, she cites the case of the Golden Door ▶

PROFILE

- ▶ in California (established in 1958), which was involved in a long legal battle with Australian spa operator Golden Door Health Retreats (established in 1993) over the unauthorised use of its name.

Ellis admits it's a complex issue. Copyright law is generally territorial, and although there are a number of international treaties requiring member countries to acknowledge the rights of each other's nationals, these are often difficult to enforce – especially in the internet age, where there are no clear borders and everyone is a writer. International patent or trademark infringements are no less of a legal minefield. However, Ellis believes it as much an ethical challenge as a legal one, and one that could be damaging to the industry if not addressed.

The good news is that, based on SpaFinder's experience, Ellis believes the problem has more to do with ignorance than wilful wrongdoing. "I would say that in almost every case, when we've sent out a letter [about copyright infringement of our trends], we've had an apology from whoever made the mistake, and it has not been repeated," she says.

Innovation through imagination

Although at the time of writing, the final agenda for this year's GSWS (taking place this June in Aspen, Colorado) is still under discussion, Ellis is hopeful that the issue of plagiarism might get some air time – if not directly, then under the

.....
Last year's summit (below) saw the launch of spaevidence.com (right) – a website to help consumers and professionals find medical evidence for specific spa therapies



The GSWS was launched by a group of top spa figures – including Pete and Susie Ellis – to create greater unity in the global industry

“In more mature [spa] markets... a lack of innovation could become a problem because if we're not growing in terms of development and revenue, we're vulnerable”

banner of the summit's overarching theme of Innovation through Imagination.

The theme of innovation in general is a topic close to Ellis' heart, and one she believes will be central to the growth of the industry as it matures. "Because our industry is young, we haven't really needed to talk about innovation before," she says. "That's still the case in parts of the world where there aren't yet a lot of spas, such as China, India and South America. But in more mature markets such as the US and Europe... a lack of innovation could become a problem, because if we're not growing in terms of development and revenue, we're vulnerable."

To achieve continued growth, Ellis believes the industry needs to look to beyond itself for inspiration. With this in mind, many of the speakers at this year's GSWS

are drawn from outside the industry, from John Kao, author of *Innovation Nation*, to Peter Rummell, chair of Disney Imagineering. "We're also going to have one whole day where we're not going to talk about the spa industry at all," says Ellis. "Instead we'll be looking at other industries and how their innovations have moved them along and changed the world."

Something else Ellis believes is crucial to the future of the industry, and also on the agenda at this year's summit, is 'spa evidence' – the growing body of scientific research that gives credence to the health and wellness benefits of spa treatments. Last year's summit saw the launch of spaevidence.com, a website designed to help both consumers and professionals find medical evidence for specific therapies. However, Ellis admits to being surprised that more spas haven't been quick to get on board. "Feedback from people who have gone to the site has been terrific, but we haven't had as many companies linking to it as we'd hoped," she says.

"We've discussed trying it in a bit more with social media and trying some other things... but fundamentally we have to do a better job encouraging the industry to engage with it, so we have more people linking to it and sharing the information with their clients."

But whatever the future holds, this much is certain: for Ellis, the success of the global spa and wellness industry remains a very personal goal. "What I enjoy most about what I do is seeing the growth of the industry and perhaps having some influence on that, in a positive way, for both the industry and the consumer," she says. "That is really very satisfying." ●





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Dual Purpose

The renown spa at the Dolder Grand in Zurich is one of the best in the industry and is serving as a destination spa for hotel guests and an urban spa for local city visitors

KATIE BARNES • MANAGING EDITOR • SPA BUSINESS

The resort dates back to 1899 and was a 'curhaus' focusing on health and relaxation

There aren't many hotel general managers who 'get' spas. It's a common challenge convincing the head of the hotel about the value a spa brings. Not so at the Dolder Grand in Zurich, Switzerland. Managing director Thomas Schmid says: "The spa's an important revenue stream, but it's more than that, it's a PR tool and people are drawn to us because of the it." He's also a fan of treatments, albeit the less fussy ones, he says: "It's the touch that's important but I'm not so keen when it gets complicated."

It's fitting then that Schmid should head up a resort which has one of the most renowned spas in the industry – one that's had spa professionals and spa-goers flocking to it since its opening in April 2008 following a CHF440m (US\$481m, €366m, £297m) transformation of the entire property (see p60).

Curhaus roots

Schmid has had a career in spa resorts, having previously worked as assistant general manager at the Bad Ragaz mineral and healing spa in Switzerland. He started at the old Grand Hotel Dolder in 2003 and was keenly involved in its four-year overhaul, he says: "it was a once in a lifetime job to be involved in the closing of a hotel and the planning and reopening of a new one."



Added in 2008, the spa was inspired by Japanese (above) and European cultures

Originally opened in 1899 on a hill overlooking the city, Grand Hotel Dolder was a 'curhaus' where locals escaped for rest, active leisure and the feeling of being close to nature. "This history of health and wellness was the reason for adding a spa," says Schmid. "With fresh air and trees, the destination was made for this and people expect it."

With the idea that a spa would be a major feature – not just an afterthought or squashed into a basement – Schmid began extensive travels to research spas from Japan, Brazil and New York to those in major Euro-

pean cities. Careful thought was also put into choosing US-based spa specialist Sylvia Sepielli, who owns the SPAd consultancy and has created leading spas worldwide including the Pangkor Laut Spa Village in Malaysia (see S805/2 p108). "It was important to have someone who would be prepared to compromise, but who could also bring something unique and new," says Schmid.

European and Asian influences

Situated in one of two new wings, the beautiful 4,000sq m (43,055sq ft) Dolder Grand Spa



The spa's design, by Sylvia Sepielli, is a unique selling point along with bespoke items such as the heated pebble-filled sunaburos



MD Thomas Schmid is a spa advocate



offers an impressive, well thought out range of facilities. These include 18 treatment rooms and two suites with beds by Gharieni, a relaxation room, and male and female wet areas with a variety of thermal experiences by Klafs. There's a generous-sized swimming pool, plus indoor and outdoor whirlpools – the latter featuring stunning views over Zurich – and a chillout room, an aqua zone flanked by a steamroom, a snow room and samarium. In addition, there's a fitness suite as well as two exercise studios, a hair salon, a library, a meditation room, and a café and shop.

The spa's sensuous design has been influenced by European and Japanese cultures. Eastern touches include kotatsu footbaths with simulated currents and pebble surfaces. There are also five sunaburos – tubs filled with fine, heated pebbles, which you just melt into – custom-designed for the spa by Klafs. Yet step into the swimming pool that's surrounded by huge, curved stone walls and you feel as if you've been transported deep into the heart of a Swiss gorge.

The east meets west theme continues with the treatment menu which has Euro-

■ The outdoor whirlpool has been purposefully positioned so users overlook the city of Zurich while taking to the waters

pean, Swiss and Japanese therapies such as bamboo shiatsu. Product houses include European brands such as La Prairie, Kerstin Florian and Horst Kirchnerberger make-up. The Japanese range Kenzola didn't sell well, however, and has recently been replaced with the German organic and natural skincare line Amala (see p62).



■ The striking resort interiors feature original art by icons such as Salvador Dalí



The curved stone walls by the pool make you feel as if you're in the heart of a Swiss gorge

- Spa director, Jann Hess says: "The design sets our spa apart. It's really special." He also says the spa is on-trend with its medical wellness offering. Down the corridor from the spa, the medical clinic is run in conjunction with local doctors and specialises in aesthetic dermatology and laser services, anti-ageing and preventative medicine and plastic surgery consultation. Aimed at hotel guests, the services, Hess admits, could be more popular and this is something he'll be focusing on in the future.

Destination and urban

Another vision for the Dolder Grand Spa was "to create an urban spa and destination spa," says Schmid. "I really wanted to have a place where someone could come for a quick treatment like a nail polish, but at the same time offer enough interest to cater for someone staying for one or two weeks – I think this makes us stand out from competitors." And figures – collected using the Reservation Assistant software system by TAC – show there's an even split between local customers and hotel guests using the spa.

One group of local users are 220 spa and fitness membership holders, with the rest ►



Comfort and candles in the chillout room

DOLDER GRAND HISTORY

The Dolder Grand Hotel & Curhaus opened in 1899. Heinrich Hürlimann, already the owner of the nearby Dolder Waldhaus hotel, commissioned Basel architect Jacques Gros to design a hotel in the Swiss rustic style popular at the time. Significant alterations took place in the 1920s and 1960s when a 60-bedroom extension was added to the 220-bedroom property.

Towards the end of the 1990s, it became clear that a major investment was needed to compete with new international luxury hotels. In 2001, entrepreneur Urs E Schwarzenbach acquired the majority shareholding to assure the necessary financing. The CHF440m transformation began in 2004, with Foster + Partners of London, UK stripping back and restoring the building's original structure and façade, yet adding modern architecture in the form of two new glass wings curving round the historic main building. Meanwhile, Interior architects United Designers, also from London, shaped the inside spaces which range from those epitomising contemporary style to historic areas with eclectic twists – such as a wide selection of original works of art by icons like Andy Warhol and Salvador Dalí.

Reopened in 2008, the Dolder Grand boasts 173 bedrooms and suites; two restaurants, one with two Michelin Stars; a ballroom, banqueting and conferencing facilities; and – of course – the 4,000sq m (43,055sq ft) spa. Also in the grounds is a public ice rink (used in the winter), swimming pool (for summer) and nine-hole golf course.



DOLDER GRAND BY NUMBERS

- A bedroom for one night at the Dolder Grand in peak season ranges from CHF540-690 (US\$590-755, €445-574, £365-466) for a superior single to CHF2,540-3,890 (US\$2,800-4,250, €2,100-3,250, £1,700-2,650) for a grand suite
- Annual occupancy is 50 per cent
- Average length of stay is 2.2 nights
- Around 70 per cent of guests are free independent travellers (FITs)
- Switzerland is the biggest source market, accounting for 17 per cent of guests, followed by the Middle East (13

per cent), Germany (12 per cent), the US (10 per cent) and Russia/CIS (9 per cent)

- The spa employs 60 staff including 25 therapists
- Massages cost between CHF190-230 (US\$208-252, €158-191, £128-155) for 60 or 90 minutes
- Amala products cost between €18-186 (US\$24-244, £15-151)
- A 12-month spa membership costs CHF7,000 (US\$7,650, €5,850, £4,750) in the first year but is reduced by CHF1,000 in years two and three

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The Westin***** Costa Navarino, Greece
Hotel Prezydent***** Krynica-Zdrój, Poland
Grand Hotel Kempinski***** Strba-Strbské Pleso, Slovakia
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RESORT SPA

► coming on day spa packages costing CHF250 (US\$273, €208, £169) Monday through Friday and CHF380 (US\$416, €316, £257) Saturday and Sunday. Only day guests on packages, rather than those booking a one-off treatment, have access to the spa facilities to avoid over-crowding.

At 30-35 per cent, the capture rate is high: although that number includes guest just using the facilities as well as having treatments. Hess says: "The key to attracting guests is having a large variety of treatments and rituals. Also the hotel's main reservation department is good at upselling."

A graduate from the Lucerne Hotel School, Hess joined the Dolder Grand two months after its reopening in 2008 and says one of the biggest learning curves for him was understanding how his team of 25 therapists approach the guests. "My background is in food and beverage and that's a lot faster paced – the waiters and kitchen staff spend only a minimal time with customers. It's different in a spa, the approach has to be softer. But what makes it the most challenging is knowing if the therapists execute the treatments to our [high] standards or just do them their own way. We're constantly asking for guest feedback to check."

There's also a strong in-house therapist training programme – with quarterly evaluations carried out by the treatment manager and assistant treatment manager.

Key performance indicators

The spa is viewed as an independent profit centre at Dolder Grand and the goal is for it to contribute 20 per cent of total revenues.

For Hess, one of the most important benchmarks is the average revenue per treatment which sits at CHF190 (US\$208, €158, £128) as well as the retail/treatment revenue split which at 25-30 per cent for retail is at the top end of industry performance. "We treat retail as another part of the service we offer guests, therapists hand-write recommendations after the treatment and provide extra consultation if necessary. They get between 5-15 per cent commission, but we also have standard training in sales, plus tuition from the product houses four times a year."

■ Spa director Jann Hess oversees 60 staff including 25 therapists



AMALA SKINCARE

The Amala skincare line was introduced to the Dolder Grand Spa in November 2011. Its products are certified 100 per cent natural and 70-95 per cent organic by Natrue – which requires at least 75 per cent of products in a range to be organic and natural before granting its seal of approval.

The spa offers three Amala treatments, including a signature Nature's Organic Seasonal Facial which is adapted every three months to incorporate ingredients from Dolder Grand's garden.

Used by top spas such as Rancho La Puerta, Mandarin Oriental and Six Senses spas, Amala is the premium product line of Germany's Primavera – a masstige skincare company. Founder Ute Leube has been working with natural ingredients for over 25 years, during which time she's established

After four years, Schmid is happy with the way how the spa's performing. "At the beginning we thought 18 treatment rooms might have been too much, but now there are some weekends when we're fully booked. Also, it's taken us this time to train enough therapists in our high quality treatments to reach this capacity – and over four years we've also built up a pool of therapists who we can call on an ad-hoc basis to cope with those big days."

The simple things

With the resort and spa still relatively new, Schmid says there are no developments in the pipeline. The biggest challenge he sees, however, is maintaining quality of service. He says: "It's easy to change design and keep the physical



■ Amala is certified natural and organic (top); founder Ute Leube and advisory board member Mark Wuttke (above)

relationships with 19 fair trade, sustainable, organic farms worldwide. Her philosophy is that the very best natural ingredients can be just as effective as high-grade synthetics.

Outside of German speaking countries, the range is overseen by advisory board member Mark Wuttke – a champion of sustainable luxury who's worked with natural medicines for more than 15 years for companies such as Jurlique.

offer fresh, so the focus has to be on quality and it's my role to guide people to make sure they notice the simple things that matter." An independent hotel, Dolder Grand has a team of four people solely focused on standards and training – "this is quite amazing as we're not a large chain," Schmid adds. "And it really is about noticing every detail – being specific about the attitude of staff, teaching them how they could do something better or in a different way."

It's perhaps not surprising then that Schmid is driven by people – both guests and staff – and understanding their different needs. For Hess, the motivation is "seeing the spa grow – it's fantastic to see what's happened over the last four years and I'm excited about the future." ●

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J. Hess
Spa Manager

The *Decker Grand*



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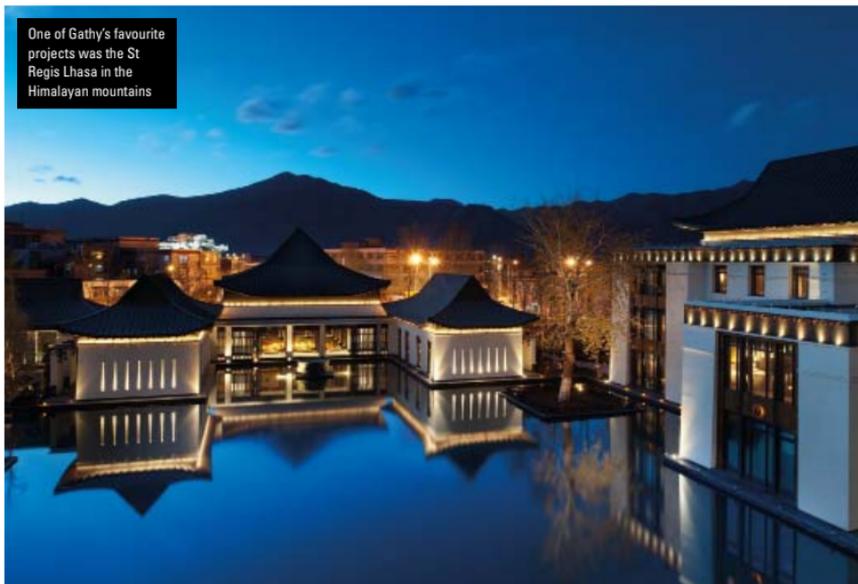
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One of Gathy's favourite projects was the St Regis Lhasa in the Himalayan mountains



JEAN-MICHEL GATHY



Architect and designer Jean-Michel Gathy of Denniston International talks about the part he plays in creating some of the most high-end hotels and spas worldwide

JENNIFER HARBOTTLE • JOURNALIST • SPA BUSINESS

Interviewing Jean-Michel Gathy, the owner of leading hospitality and spa design company Denniston International, gives you the same feeling as being hit by a huge surfing wave: exhilarated but totally overpowered.

Working for top international clients such as St Regis, Banyan Tree and One&Only, he spends an average of three weeks overseas travelling each month, so tying him down for an hour-long chat is almost impossible. But that's just the start. Questions planned and asked get thrown out the window and any semblance of control is lost as Gathy takes you on a whirlwind tour of his life, coloured with stories, anecdotes and observations of such minute detail that it's hard to fathom how he remembers it all.

This is just the way Gathy likes it. A design legend in the leisure industry, Gathy is one of those blessed individuals whose work is so revered he can call the shots and only takes on a project if he likes the people, the concept and the location. "I have to like the destination [first] for me to take a project on," he says "I don't mean to sound arrogant, it's



Denniston's client list is impressive and includes the Fuchun Resort in China



Aman Sveti Stefan in Montenegro is a Denniston project.



Gathy is proud of his hotel and spa design at Chedi Muscat because of its drama

just that we get approached to do so many that I can afford to turn some down."

If this makes Gathy, a Malaysian resident originally from Belgium, sound candid, let me set the record straight. By the end of our conversation, I'm almost ringing the bell to lend me money to build a spa so I can spend more time with him. Charming, funny and as passionate about spas as anyone I've met, he could (probably) get away with just about anything. "I'm a terrible administrator and manager – I'm a pure creative," he says. "I love art, travel, hotels and design; but most of all I love creativity."

A WINNING CULTURE

Since a young age, Gathy had always wanted to explore the world and he figured "being a hotel designer would mean I would travel often". After his studies in Belgium, he got a job at the University of Liege working as a collaboration of architects and was sent to Indonesia on a project. While there, he fell in love with Asia and in 1983 moved to Hong Kong where he set up his own architectural firm – Denniston Architects.

PERSONAL FILE

Favourite colour: Blue
Hobbies: Collecting art
Preferred material to work with: Timber and stone
Spa you most love: Amankora Gangtey in Bhutan
Spa design you're most proud of: One&Only Reethi Rah – because

of the interaction between architecture and landscape; and the Chedi Muscat for its drama
What would be your dream project? A cozy mountain resort in the Himalayas; or a top-notch high-rise hotel in Shanghai
Best piece of advice: "Know your duty and not what is owed to you" by my late father

By 1989, Denniston had offices in Singapore, Thailand and Indonesia. But despite loving Hong Kong, Gathy left there to enjoy the less expensive lifestyle and the increasing number of opportunities in Malaysia, where his headquarters are still based.

Today, Denniston employs 155 full-time architects and designers, made up of 23 different nationalities. According to Gathy, this makes for an interesting debate in the office. He says: "When you have people of different nationalities, ages, sexes and religions working together, it becomes a very engaging and exciting workplace."

It is Gathy, however, who is the public face of the firm and in April 2006, he was inducted into the Platinum Circle of Hospitality Design which honours individuals who have contributed significantly to the world of hotel design. His company's client list reads like a who's who in the world of high-end hospitality development, and includes revered brands such as Amanresorts (SBI10/2 p24), GHM, Park Hyatt, St Regis, Shangri-La, Banyan Tree and One&Only.

Gathy regularly works with the top names in the industry. In 2010 he worked alongside renowned French designer Philippe Starck to ▶



Point Yamu, COMO Hotels & Resorts' latest high-end development is due to open in Phuket this December

► create a series of luxury villas in Phuket for developer Campbell Kane. Currently, he's working with Italian interior designer Paola Navone on Point Yamu – a COMO Hotels & Resorts high-end development, also in Phuket, that's due to open in December.

His introduction to spas came in 1993, when he was asked to design the first ever Mandara Spa at Chedi Toraja in Indonesia. "At the time, I had very little knowledge of the spa industry – few did. I had no personal experience of going to a spa and certainly no commercial idea because there was no pampering spa business model to follow in the hotel industry. My first reaction was curiosity, followed by instant attraction."

Gathy credits the Mandara project as the start of his love affair with the spa industry. Now he's addicted. "From a purely creative perspective, spas are very aesthetic. I love them because they give me the chance to exercise my creative side.

"Projects where the outside of a building influences the feeling inside – as with a spa – are very interesting to design. It's so much better if you open the door or windows of treatment rooms and see a beautiful landscape. The topography and how the building



Gathy loves the mix of location and architecture at One&Only Reethi Rah in the Maldives

I had little knowledge of the spa industry – few did... My first reaction was one of curiosity followed by instant attraction... I love spas because they give me a chance to exercise my creative side

sits on its site all play a part in how the inside of the spa is going to look and feel."

LOCATION, LOCATION, LOCATION

I ask Gathy whether this is why location plays such an important part in determining which projects he takes on. "With destination spas, it's always the site that inspires and guides me. When I arrive in a destination, something will always trigger my senses. Every time, I start with a white piece of paper and ask myself, 'OK, what's special about this site, this idea, this company's values?'"

As testament to this, Gathy explains that one of his favourite projects to work on in 2011, was the St Regis Lhasa Resort (SB11/

p56) with its Iridium-branded spa because of its location in Tibet. Standing 12,000ft (3,658m) above sea level, the luxury 162-bed-room spa resort has awe-inspiring views of the Himalayan mountain range. And this year, Gathy is particularly excited about working with an Indian spa operator the Mayar Group with plans to open at least one high-end destination spa, because it gives him the opportunity to spend time in India where wellness is a way of life.

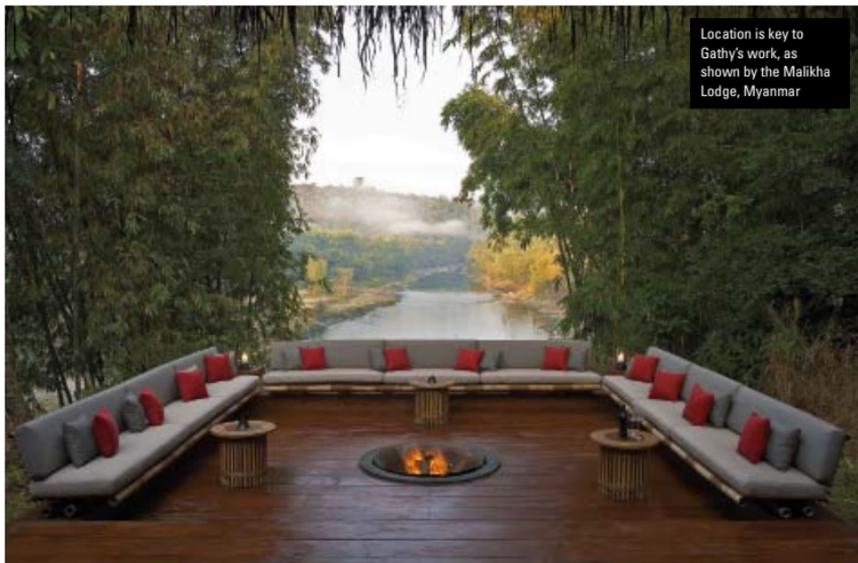
Talking to him, I suspect the cachet of working with certain companies also plays a part in which projects Gathy works on. As well as working for spa super brands such as Mandarin Oriental and ESPA, his future client list could be mistaken for Paris Fashion Week. His company is working on the first Armani Resort in Marrakech that's due to open at the end of 2014 and the first four Cheval Blanc hotels. Cheval Blanc is the hotel management arm launched by LVMH and each property will feature LVMH fashion-branded spas such as Givenchy and Guerlain. In all, Gathy is working on 30 spas right now (see opposite).

DESIGNING FOR BUSINESS

Yet designing only for the world's top hospitality firms must have its drawbacks – I ask Gathy what challenges he faces. "Design is not an ego trip – it's still a business," he says. "It's important to come up with something

FUTURE PROJECTS

- Aman Vinh Hy (resort and spa), Vietnam, opening 2013
- Ancient Residential (Banyan Tree resort and spa), Shanghai, China, opening 2013
- Chedi Andermatt (resort and spa), Switzerland, opening 2013
- Palazzo Papadopoli (resort and spa), Venice, Italy, opening 2013
- Park Hyatt Sanya (resort and spa), Hainan Island, China, opening 2013
- Boutique resort in Randheli (standalone spa), Maldives, opening 2013
- Al Soda (resort and spa), Oman, opening 2014
- Amanoca (resort and spa), Brazil, opening 2014
- Armani Marrakech (resort and spa), Morocco, opening 2014
- Grand Hyatt Lijiang (resort and spa), China, opening 2014.
- Mayar Group's Wellness Resort Gurgaon (standalone spa), India, opening 2014
- Herdade da Comporta development (resort and spa), Portugal, opening 2015



Location is key to Gathy's work, as shown by the Malikha Lodge, Myanmar

new and attractive but we have certain obligations – we are creating someone's business so although my ideas are inspired, they have to fit within the financial parameters.

"As an architect, sometimes you see a client taking the wrong approach to how they want their spa to look, so you also have to be a diplomat! I'm lucky because I have leverage – I'm 56 years old and because I've done so many projects most clients trust my opinion. They know I'm not a creative pushover."

Despite this, Gathy admits he's not always got it right in the past. "I've made millions of mistakes! I've made operational, financial, design and logistical mistakes – after all, we're all human aren't we?"

Often wrong steps are taken when the client's expectations are unrealistic, he says. They frequently want too much for too little money and don't realise the consequences of insisting on including certain options. "Other times, projects don't get built simply because they're too much of a physical challenge," he says. "I was once asked to design a spa at the top of a mountain in Bali, but the mechanical and electrical obstacles of the site made it physically very trying."

THOUGHT LEADERSHIP

With his hectic travel schedule and, spas have become a lifestyle for Gathy as well as a job. He and his wife (who frequently travels with him), have become discerning



Top hotels, like Viceroy Snowmass, US, are now being compared by their spas as well as their bedrooms and restaurants

spa-goers and they "always stay in a hotel with a spa, whenever they travel."

Meanwhile, his inner circle of friends include consultants, operators and suppliers from the spa industry. It is they, he says, who keep him up to date with the latest trends and inspire him with their thought leadership. "These are the people who so generously

share their knowledge and information and help shape the future of spa design."

Gathy is upbeat and excited about the future of the luxury spa industry. "Consumers are much more choosy now – they expect a hotel to have a spa and I mean a proper spa. This means that hotel brands are being compared by their spa as well as their rooms and their restaurants, which is forcing hotel operators to come up with new and different ideas. I think that the spa branding market is now progressively creeping in line with the hotel branding strategy." ●

Samui Spotlight

The arrival of global hotel brands is contributing to the evolution of Thailand's third largest island into a luxury lifestyle destination. We visit Koh Samui's new resorts and their respective spas.

NEENA DHILLON • JOURNALIST • SPA BUSINESS

Blessed with palm-lined beaches and verdant hills, Koh Samui has steadily been shrugging off its reputation as a backpacker's haven to position itself as a sophisticated yet laid-back tropical retreat. Several international hospitality groups have identified the opportunity presented by Thailand's second most popular island, opening five-star resorts. Naturally these include spas that must measure up to the award-winning facilities associated with south-east Asia. "Koh Samui is known for its holistic and yoga offering," says a five-star hotelier. "But the challenge for my colleagues and I – in partnership with the Tourism Authority of Thailand – is to raise awareness of the island as an upscale spa destination."

Koh Samui registered visitor numbers of 859,501 in 2011, a rise of 8 per cent on the previous year, according to consultancy

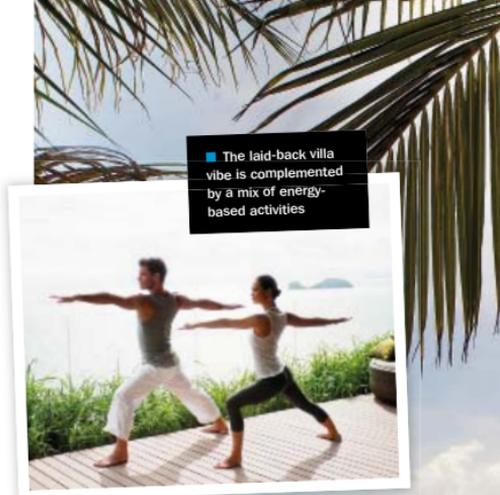
C9 Hotelworks. While Germany, Thailand and the UK continued to represent the three most important source countries, China and Korea became key emerging markets. Other positive indicators included a 6 per cent increase in hotel occupancy to 60 per cent, as well as a 16 per cent surge in average room rate to over US\$150 (€113, £92). "Growth in luxury and upscale properties is spurring the cyclical pendulum of volume and average rates forwards," explains Bill Barnett, managing director of C9 Hotelworks.

"New direct flights on SilkAir from Singapore and on Bangkok Airways from Kuala Lumpur are aiding the cause. This reflects a wider shift in guest profile from long-haul to regional visitors, driven by the escalating prominence of Asian economies and continuing recession in Europe."

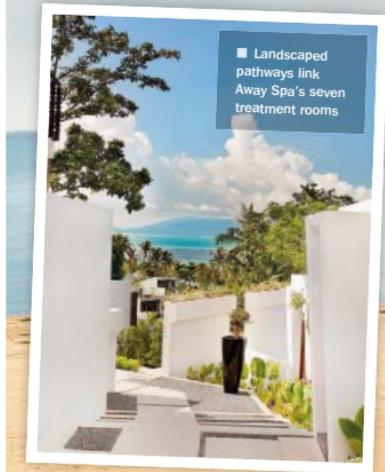
Still, compared to Thailand's most popular island, Phuket, which attracts millions of tourists annually, Koh Samui's relatively modest numbers can be attributed in part to accessibility issues caused by its modestly-sized airport. While some islanders are against expansion – environmental concerns combine with a desire to keep Koh Samui

protected from mega-sized development – there is no doubting the call for improved transportation links go hand in hand with hotel growth. Although the pipeline is flattening out – only a 3 per cent increase in the existing supply of over 17,000 rooms is expected in the next two years – Koh Samui's midscale and budget sectors in particular are reliant on low-cost carrier uplift.

In the meantime, the current crop of new high-end hotels is already having an impact, creating media buzz and drawing in affluent travellers. World-class spas, meanwhile, are integral to an island that now aims to cater for a style-conscious breed of sybarite.



The laid-back villa vibe is complemented by a mix of energy-based activities



Landscaped pathways link Away Spa's seven treatment rooms

New high-end hotels are creating a media buzz and world-class spas are integral to cater for a style-conscious breed of sybarite



■ The beachfront property is one of four W retreats and has been created as an 'island within an island'

Away Spa at W Retreat Koh Samui

Making the hot lists of consumer magazines such as *Condé Nast Traveler*, Starwood Hotel's first W-branded destination in south-east Asia debuted in November 2010. Developed by Amuraya and Istithmar World at a cost of THB3bn (US\$98m, €74m, £60m), the 26-acre (11-hectare) beachfront property is one of four global retreats operated by Starwood's design-led lifestyle brand. Positioned as an 'island within an island' in line with its peninsula setting on Koh Samui's northern

shore, W Retreat maintains a Zen-like calm during the day while at night a touch of Manhattan attitude comes into play.

"W bridges the gap between an idyllic villa-based escape and a more interactive, urban experience," observes general manager Nicholas Downing. "This is not your typical five-star Thai hotel – W's passion points of design, music and fashion are represented with a laid-back energy that suits the Koh Samui vibe and as a retreat we are open to other island visitors."

Interiors by P49 Deesign and architecture by MAPS Design Studio, adhere to clean lines, flowing indoor/outdoor spaces and a sculptural use of warm materials lifted by colour pops, inventive artwork and oversized lighting. This is exemplified in the W Lounge where terrazzo stone and bleached veneer panels, akin to driftwood, lead the way to a panoramic open-air platform that is home to the WOOPA (bar) and an infinity-edged, lotus-shaped water pond. Found beneath the lounge, the Kitchen Table serves ▶



■ The resort's WOOPA (bar) is set on an open-air platform leading to a lotus-shaped pond

► made-to-order cuisine while beachfront dining options include Japanese restaurant Namu and SIP lounge. All 73 guest villas boast their own pools and patios.

In a retreat that promises escape, the 1,000sq m (10,764sq ft) Away Spa and Energy complex (W's own brand) is considered an essential ingredient. Positioned on the second floor of a centrally located build-

ing that also houses the Sweat fitness centre and Wet swimming pool, the spa reception welcomes visitors to a setting of bleached oak wood and cream terrazzo augmented by playful furniture, such as custom-design leather pods inspired by Zen rock gardens and woven rattan and leather rockers. The Style Lab, with its two circular, fabric-fringed stations for manicures, pedicures and Paul

Mitchell hair treatments, adjoins reception. From here visitors can also access Tonic Bar, a soothing space where vitamin-rich juices, herbal infusions and healthy versions of Thai dishes are served. All spa clients are brought here after treatments but Downing explains that marketing efforts are being made to increase awareness of Tonic as a resort venue in its own right.

Spread across five external pavilions, reached through a short network of landscaped pathways and stairs, the seven treatment rooms (four single and three doubles) are equipped with individual changing facilities and rain showers. The doubles also have soaking tubs, relaxation zones and in one case an additional steamroom integrated into sheltered outdoor platforms.

Consultancy Spa Synergy – part of the AW Lake group – partnered with W Hotels in developing the facility around the ideas of detoxing and refuelling, as well as ensuring the implementation of brand standards and signature treatments with destination-specific twists. So the Away Massage incorporates a Thai detoxifying technique, lanna tok sen, which removes negative energy through the vibration of wooden instruments. Organic spa brand Pañpuri



■ A touch of Manhattan-attitude comes into play at night in the SIP lounge

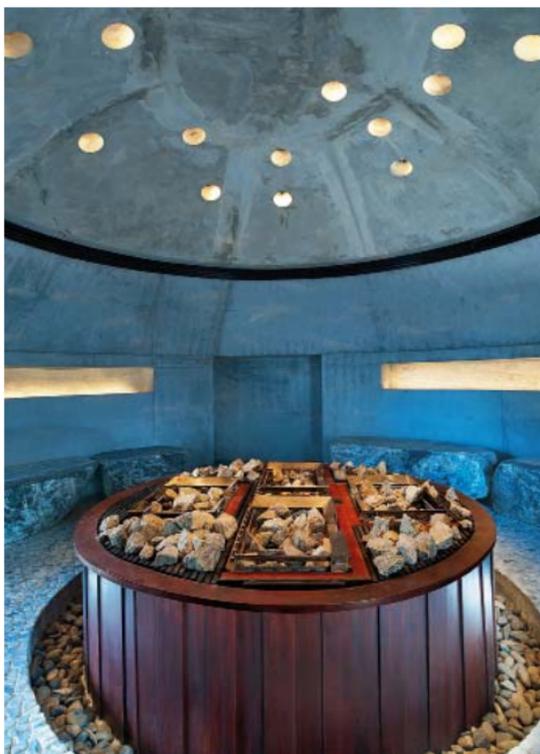


The Style Lab has two stations for manicures, pedicures and Paul Mitchell hair treatments

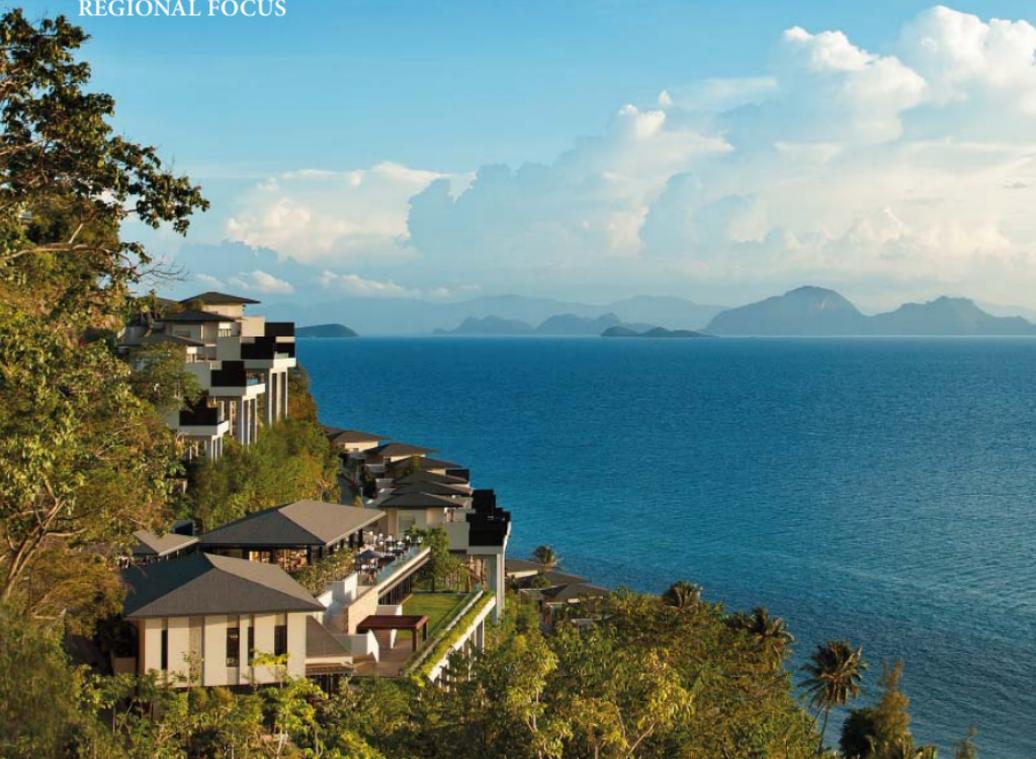
provides the oils and products for body treatments, including a signature line conceived for Koh Samui, while Dermalogica facials are featured alongside spa packages starting at 180-minutes and costing THB6,900 (US\$225, €169, £138).

Giving Away a unique point of difference is the Thaimazcal, inspired by traditional Mexican temazcal sweat lodges that used natural heat for purification. Set in its own domed structure, with heated rock seating, the thermal facility allows for small groups to self apply body scrubs made from natural ingredients before sweating in volcanic rock-generated steam and then cooling down under a mosaic-lined water wall. "To bring a Thai touch to the social experience, our therapists show clients how to make the most of the steam through yoga breathing," adds spa manager Pornsawan Limphapayom.

There is also a wide range of Energy-based activities – sunset yoga, aqua aerobics, Thai boxing and water sports – taking place regularly around the resort. Limphapayom and her team of six therapists take a personalised approach to promoting wellbeing, visiting the beach and meetings during coffee breaks to offer free massages and build awareness of their approach at Away Spa. ▶



A unique feature is the Thaimazcal, inspired by Mexican sweat lodges



The Spa at Conrad Koh Samui

Cascading down a lush, landscaped hillside on the south-western tip of Koh Samui, Conrad Hotels & Resorts' second property in Thailand introduced a new level of luxurious seclusion when it opened in September 2011. Commanding vistas of the Gulf of Thailand and the legendary Five Islands dominate the 25-acre (10-hectare) resort. The property has been meticulously planned and developed over a five-year period by a team including Hilton Worldwide's senior management (SB11/3 p28) and owner Hillcrest Resorts.

To integrate the new-build into the landscape while weaving in an ecological element, the development's series of public spaces – including a picturesque lobby, Asian fine dining restaurant, all-day Mediterranean restaurant and poolside bar – are designed around four descending zones of rock, wood, lawn and water. Each one of the 80 guest villas benefits from floor to ceiling windows,

contemporary Thai décor and an outdoor, west-facing private plunge pool.

"In translating Conrad's brand culture to Koh Samui, we felt it was imperative to offer a cutting-edge, beautifully designed spa with panoramic views," says general manager Justin Phillips. As a destination that caters for sophisticated leisure travellers – many of whom spend the majority of their time onsite – Conrad Koh Samui features a 1,100sq m (11,840sq ft), two-storey spa perched in an elevated position. It houses 10 treatment rooms (three doubles, five single and two Thai suites), each with their own terrace; a wet zone of Finnish saunas, steamroom, plunge pools and rain shower; relaxation lounge; beauty salon; and retail boutique. Clean, uncluttered interiors blending earth hues, wooden floors and naturalistic artworks complement the building's feature walls of natural rock and curved timber shingles. Special one-way glass floods

the facility in natural light. The most coveted space, a sizeable VIP double suite, is distinguished by a stunning outdoor deck with infinity-edged plunge pool and hot tub overlooking the sea.

A fitness centre, at the foot of the resort, is equipped by Technogym and has an outdoor deck for pilates, t'ai chi and yoga.

Vanessa Main, Hilton Worldwide's director of spa operations and development Asia Pacific, has overseen the spa concept in collaboration with consultancy Salamander Lifestyle and Dr Buathon Thienarrom, a respected Thai-based holistic practitioner engaged to create therapeutic Asian treatments and deliver training. Spa manager Nicharee Palang, who leads 10 Thai therapists all with upscale hotel experience, notes that holistic treatments, such as the Zen Natai massage drawing on Chinese medicine, are proving popular with western guests. Asian clients, meanwhile, tend



■ Five years in the making, the resort is designed around zones of rock, wood, lawn and water



The 80 villas benefit from floor to ceiling windows and contemporary Thai décor



The two-storey spa features special one-way glass to flood it with light

to favour the results-oriented western facials that also form part of the menu. Massages, such as the one-hour De-Stress Muscle Release priced at THB3,300 (US\$107, €81, €66), remain universal in their appeal.

Aromatherapy Associates, the main supplier, has formulated a small line of products with native ingredients, such as organic coffee and coconut, for signature therapies that are unique to the resort, including Samui Enriched, a rejuvenating two-hour body scrub, soak and massage. Traditional Thai massage is also available, as are bespoke programmes booked in time blocks.

Summing up The Spa's philosophy, which is primarily focused on in-resort clients, Phillips adds: "We want to take guests on a transformative journey incorporating the healing scent and effect of aromatherapy oils, the therapeutic benefits of intuitive touch and the sound of tranquil music, set in luxurious surroundings." ▶

New & future openings



The resort reopened in February following a 10-month renovation

■ InterContinental debuts

InterContinental's third Thai property, the US\$25m (€19m, £15m) InterContinental Samui Baan Taling Ngam Resort opened in February on a 22-acre (9-hectare) site on the island's west coast. Owned by Serenity Asset Company, the renowned development has been under the management of various hotel companies including Mandarin Oriental.

As a result of a 10-month renovation a new 600sq m (6,458sq ft) has been added. Designed by P49, the Baan Thai Spa has been conceived as a traditional Thai house, with

teak wood interiors accented by cool indigo blue. It features one treatment suite with a soaking tub, four double rooms, one Thai massage room, a beauty salon, an ayurvedic consultation room and a yoga studio with ocean views. Asia Pacific Leisure Consulting has delivered the spa concept, menu, training and wellness programmes.

Thai, western and ayurvedic therapies incorporating Harnn, Sothys and Esthederm brands underpin the menu but each treatment begins with foot bathing and ends with an Asian tea ceremony using Harnn's Tichaa collection of herbal infusions.

■ Le Méridien returns

Starwood reinstated its Le Méridien brand to Koh Samui in the third quarter of 2011, taking over the former Langham Place. Owned by GuRich Company, the 77-bedroom beachfront property originally opened in November 2009 with a feng shui-oriented design by Bangkok firm Begray. Starwood closed the original Le Royal Méridien Baan Taling Ngam, which was situated on the site of the new InterContinental, in 2006.

Embracing Chinese, Thai and Balinese cultures through architecture and artwork, Le Méridien Koh Samui Resort features a 580sq m (1,903sq ft) Le Spa consisting of five double treatment rooms, relaxation lounge and welcome area. Pachchanya Worrasednorrakorn, who previously worked at Outrigger Koh Samui, has just been appointed as spa manager. The treatment menu has a strong Asian influence and includes therapies such as a chakra-based crystal ritual, tamarind body cleanse and herbal hot compress.



The resort's 'lightway arrival' sets the tone for the feng shui design inside

Guests enter through salvaged Chinese mansion doors from the 1700s and are guided by therapists carrying lanterns to a basement spa that offers views out to water walls and landscaped gardens. Antique wood, natural stone and brass fixtures feed into the resort's overall construction around the five elements of wood, fire, earth, metal and water.

Starwood is set to further strengthen its island presence when the Vana Belle Samui Resort & Spa, which is part of The Luxury Collection, opens this October.



Akaryn ups the ante

Owned and operated by Akaryn Hospitality Management Services, an independent Thai company, the five-star Akaryn opened in March on little known Hanuman Bay in Koh Samui's north-eastern corner. The THB400m (US\$13m, €10m, £8m) boutique resort venture, featuring 34 pool suites, embraces nature through integrated outdoor living spaces. With contributions from The Beaumont Partnership and Paisarn Krusong, the retreat's Asian-influenced design revolves around an ancient almond tree where a black lava rock swimming pool has been installed.

The group's Spa IV brand has been given a twist with each of the four treatment rooms themed around a crystal, its colour and powers. The spa uses its own line of organic products. Yoga, meditation, t'ai chi and qigong are offered on Spa IV's rooftop.

Mövenpick moves in

Slated to open by the third quarter of 2012, the Mövenpick Resort & Spa Mae Nam Beach will represent the Swiss company's third property in Thailand, with another three hotels due in the country by 2014. Developed by Samui Seaview, the 81-villa resort is situated on the northern shore of Koh Samui with design by local firm, Noppadon. A signature spa will comprise eight single treatment rooms, eight double treatment suites, a fitness centre, yoga pavilion and retail shop. "We will promote it as a destination wellness centre offering spiritual tranquility," says general manager Roland Svensson. "Built as an ancient teak house village set around a garden style courtyard with a lotus pond, the spa concept is based on rejuvenating Thai therapies and personalised packages."



ITALIAN STYLE
IN WELLNESS CONTRACT

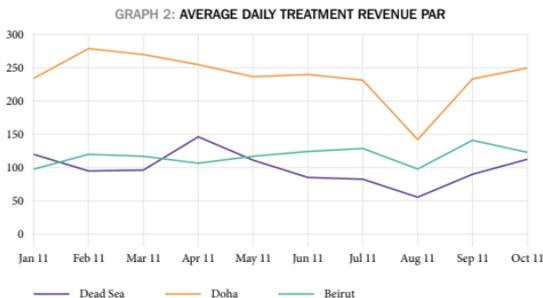
PEAKS & TROUGHS

The highs and lows of hotel spa performance in Beirut, the Dead Sea region and Doha in 2011

PricewaterhouseCoopers' (PwC) benchmarking of Middle Eastern hotel/resort spas now includes a third destination – Beirut in Lebanon – in addition to the Dead Sea region in Jordan and Doha in Qatar (s810/3 p30). According to Mohammad Dahmash, a PwC partner in the Middle East: "We continue to benchmark hotel spas which have become an established amenity within urban and resort hotels."

All three studies are the only benchmark reports covering the spa market in each region and their purpose, says PwC, is "to provide spa operators with a benchmark of internal spa operations that can be used as a tool for making operational decisions and driving profitability, as well as giving information on common indicators that can be used by everyone from investors and developers to the Ministry of Tourism."

A minimum of three international hotels/resorts have been included in each market report which, according to PwC, represents a large proportion of the five-star hotels in each region, and the benchmarks track 11 key performance indicators – all revenue related. Costs and profitability are not covered by the reports because "some operators were not comfortable with providing us with this information," says PwC's senior man-



Unlike hotel spas in Doha, those in the Dead Sea region relied almost exclusively on hotel residents with no revenues from fitness and memberships

ager in the Middle East Yohaán Freitas. It's also important to note that all figures for 2011 were recorded from January to October rather than throughout the year.

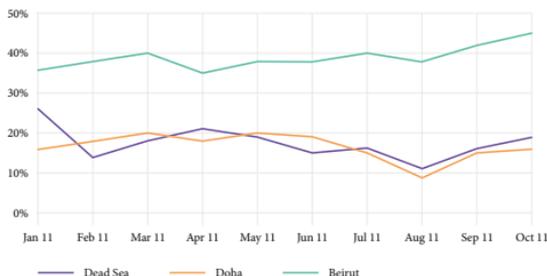
DOHA, QATAR

Dahmash describes Doha in Qatar as a "city increasingly known as a corporate capital and as a sporting destination".

The hotel spas in the benchmark survey in Doha derive the majority of demand from the local market. In 2011, 60 per cent of total revenue was generated by fitness and membership revenue, while in 2010 the figure sat at 64 per cent. Further, around 85 per cent of treatments are booked by non-hotel guests. Retail generates a small proportion of overall revenues at around 3 per cent.

Average daily revenue per available treatment room (RevPATR) was US\$234 (€176, £144) in 2010 and US\$238 (€179, £147) in 2011, with a similar seasonality pattern. The 2011 Doha figures reported to PwC for RevPATR and RevPOTR – revenue per occupied treatment room – are the same, which is not possible with treatment room utilisation at 17 per cent. A comparison with 2010, where the figures appear to have been correctly reported to PwC, would suggest that the values are for revenues per available, rather than per occupied, treatment room.

GRAPH 1: UTILISATION OF TREATMENT ROOMS' HOURS





Spas in Doha hotels achieve the highest revenues per treatment sold of the three regions – US\$133 in 2011, which was an 11 per cent increase from 2010

PAUL COWAN / SHUTTERSTOCK.COM

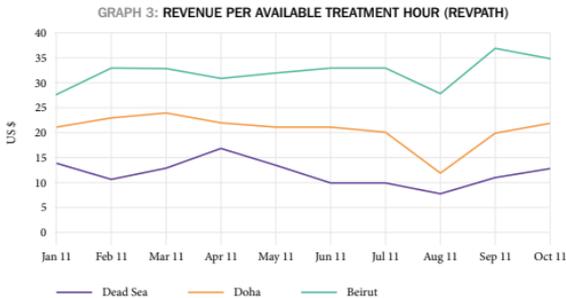
The utilisation of treatment room hours at around 17 per cent is relatively low, consequently the revenue per available treatment hour (RevPATH) is also low at US\$19 (€14, €12) in 2010 and US\$23 (€17, €14) in 2011. Given the infrequent usage by hotel residents, there appears to be no correlation between RevPATH and the proportion of treatments booked by hotel guests.

August is the quietest month of the year, due to Ramadan, with utilisation of treatment room hours at an average of 9 per cent – compared with 20 per cent in both the peak months of May and March. Revenues also plummet in August with RevPATR at US\$144 (€109, £89) compared with US\$279 (€210, £172) in the peak month of February, and an average throughout the year of around US\$238 (€179, £147).

Utilisation of therapist hours is also fairly low at 27 per cent in 2010 and 25 per cent in 2011. This decreases to 14 per cent in August. The daily revenue generated by each therapist averaged US\$318 (€287, £235) in 2010 and US\$375 (€283, £231) in 2011. In August it dips to US\$240 (€181, £148).

DEAD SEA REGION, JORDAN

Dahmash describes the Dead Sea region in Jordan as a “well recognised wellness destination”. Yet of the three destinations



benchmarked by PwC, spas in this area had the lowest revenues and utilisation levels (see Graphs 1, 2 and 3).

Unlike the hotel spas in Doha, they relied almost exclusively on hotel residents. The hotels derive no revenues from fitness and memberships and the majority of treatments are booked by hotel residents – 91 per cent in 2010 and 2011. Retail constitutes a larger proportion of overall turnover at 9 per cent.

The average daily RevPATR was US\$122 (€92, £75) in 2010. In 2011, RevPATR stood at US\$101 (€76, £62), while RevPATH was US\$10 (€8, £6) in 2010 and US\$9 (€7, £5) in

2011. Utilisation of treatment room hours averaged 18 per cent in both 2010 and 2011.

August is also the quietest month in the Dead Sea area with utilisation of treatment room hours dropping to 11 per cent and daily RevPATR declining to US\$57 (€43, £35). January and April are the peak months with utilisation of treatment room hours at 26 per cent in January and RevPATR of US\$147 (€111, £91) in April.

Utilisation of therapist hours was 40 per cent in 2010 and 36 per cent in 2011. This dips to 22 per cent in August. The daily revenue generated by each therapist was US\$343 (€259, ▶

The low utilisation and revenue levels suggest that these are [all] difficult markets, particularly if spas are considered separate profit centres



Spas in Beirut hotels significantly outperformed the others in the Middle East in terms of RevPATH

► £211) in 2010 and US\$303 (€228, £187) in 2011. In August it dips to US\$199 (€150, £123).

BEIRUT, LEBANON

Beirut is a "chic, high-end leisure destination in the Middle East" says to Dahmash.

Like Doha, the Beirut market derives a high proportion of revenues from the local community. Fitness and membership revenue generates around 45 per cent of total revenues and 60 per cent of treatments on average are booked by non-hotel guests.

Interestingly, although the revenue per available treatment room in Beirut is only 15 per cent higher – at US\$118 (€89, £72) – than that achieved by the spas in the Dead Sea (US\$101) and half of that achieved by spas in Doha (US\$238), the Beirut spa significantly outperform in terms of RevPATH generating US\$32 (€24, £20) versus US\$19 (€14, £12) in Doha and US\$14 (€11, £9) in the Dead Sea region. This suggests that the Beirut spas are possibly open for shorter hours.

January and August are the quietest months in Beirut, with daily treatment revenues per available treatment room averaging US\$99 (€75, £61), while the peak month of September generates US\$141 (€106, £87).

Similarly, the productivity of therapists is higher in September at US\$226 (€170, £139) – for daily treatment revenue per therapist, while the comparable figure in January 2011 was US\$152 (€115, £94) and US\$161 (€121, £99) in August. These are significantly below the peak productivity levels for Doha at US\$437 (€329, £269) in May and the Dead Sea region at US\$354 (€267, £218) in January.

AVERAGE REVENUE PER TREATMENT SOLD

Across the three markets, the average revenue per treatment sold is relatively stable throughout the year, with the exception of October in Beirut where it drops significantly. Doha achieves the highest revenues per treatment sold of the three regions at an average of US\$133 (€100, £82) in 2011, an 11 per cent increase on the comparable figure for 2010 which was US\$120 (€90, £74). Despite the October trough, Beirut achieved an average of US\$83 (€63, £51) in 2011, while the Dead Sea region shows little seasonality on this key performance indicator with an average for of US\$77 (€58, £47) in 2011, a 5.6 per cent increase on the comparable figure for 2010 at US\$73 (€55, £45).

TRENDS

This is the first year that PwC has covered Beirut, so no comparable data exists for 2010. However, a comparison of January to October 2010 versus the same period in 2011 of the Doha and Dead Sea markets shows some significant declines in terms of RevPATR and utilisation of therapists' hours in both the Dead Sea and Doha markets.

In addition, the decline in performance has occurred in spite of increases in the average revenue per treatment sold in both of these markets (see Table 1).

TABLE 2: REVENUE PER AVAILABLE TREATMENT ROOM

US\$	2010	2011
Doha	91,141	86,870
Dead Sea	44,603	36,865
Beirut	n/a	43,070
USA	120,195	n/a

Source: PwC Middle East, PKF US

GLOBAL COMPARISON

So, how do these markets compare with others worldwide? The statistics don't cover a full year – only January to October. If they are annualised (based on the 10 months provided), the revenues per available treatment room are low in contrast to the same year figures in the US for example. Further, although not yet available, the indications are that the 2011 figures for the US are likely to be higher than those of 2010 (see Table 2).

The comparison is of course not totally correct because the Middle Eastern figures are extrapolated, but they nevertheless provide some indication of the quantum.

Although low, treatment revenues in the Doha and Beirut spas only generate around 35 per cent and 49 per cent of total revenues, respectively, with the rest coming from fitness and memberships and retail revenue. However, the Dead Sea spa market, which has the lowest treatment revenues out of the three areas, also has no fitness and membership revenue whatsoever.

In conclusion, although the studies don't provide cost and profitability data, the low utilisation and revenues levels suggest these are difficult markets, particularly if spas are considered separate profit centres and without taking into account any benefits they might generate in terms of hotel room occupancy and average achieved room rates. ●

For full copies of these PwC spa benchmarking surveys in the Middle East region, email yohaam.freitas@ae.pwc.com.

TABLE 1: AVERAGE TREATMENT REVENUE PER TREATMENT SOLD

January to October			
US\$	2010	2011	% change
Dead Sea	73	77	6%
Doha	120	133	11%

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GAME CHANGER



Gaming's addictive features – challenges, rewards and social pressure – may be some of the most powerful weapons

ever invented to get people to jump-start, and stick to, healthy lifestyle changes says Susie Ellis

SUSIE ELLIS • PRESIDENT • SPAFINDER INC

In our 2012 *SpaFinder Trend Report*, we named online wellness gaming one of the most interesting, innovative future spa and wellness industry trends to watch. With more medical experts arguing that gaming's uniquely engaging core mechanisms – from rewards systems to social dynamics – are effective in getting people to sustain healthy regimes, the online gaming and spa connection is super logical and powerful. While the trend remains largely predictive at this point – because online gaming is hands down the most explosive consumer media form and almost every industry is 'getting into gaming' – it will inevitably evolve.

USER ALIGNMENT

Let's start with a few facts: a staggering half a billion people worldwide play online games for at least an hour a day. And they're not all teenage boys down in the basement zapping villains in games like *World of Warcraft*. While hardcore gamers are more likely to be male and younger, the massively popular social, casual games category – think games like *Farmville*, *Bejeweled* and *Angry Birds* – is actually dominated by an older more female demographic.

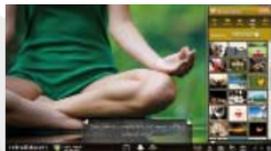
A comprehensive study of US and UK gamers, *PopCap Social Gaming Research 2011*, shows that the average player of online social games is now a 43-year-old woman – with

female social gamers outnumbering males 55 per cent to 45 per cent. Another study, *Kabam Social Gamer 2011*, reveals that the average first-time social gamer is a 50-plus year-old woman. This online social gaming demographic squares precisely with spa-goers: a demographic that is roughly 70 per cent female and aged around 40-45, according to a series of online surveys by Spafinder.com. So spa-going and online social/casual gaming consumers are very much aligned.

YURI ARCHER / SHUTTERSTOCK.COM



The average player of online social games is now a 43-year-old woman... a demographic that squares precisely with spa-goers



Insurance firm Aetna used MindBloom to create *Life Game* to make it fun, rewarding and social for members to achieve wellbeing goals – whether drinking more water or planting a tree



It's getting easier to monitor bio-information, making wellness gaming more precise

When you add the social gaming layer, research shows that people are radically more likely to adhere to health programmes

But, as noted in our trends report, the big, powerful and truly game-changing gaming and wellness connection lies ahead – and it involves 'serious games', a new online, social gaming category. Serious wellness gaming platforms are rapidly developing as medical experts agree that gaming could be the key to changing the world's health. If countless medical studies show that the old directives from doctor to patient dramatically fail to keep people on track, the 'gamification' of getting people to adhere to regimens – whether fitness, diet, stress reduction or even beauty – seems to work far better.

Gamification means putting into play elements like voluntary participation, rules, points, levels of achievement, challenges/goals, rewards and a social feedback system to keep people in the health game. When you add the social gaming layer, research shows people are radically more likely to adhere. Add to the mix new gadgets that make it easier to monitor bio-information – such as uploading vital signs, calories burned and steps taken – and connect the results online, you can see how the online wellness game could get very precise and real.

WELLNESS GAME EVOLUTION

While fitness/health games such as Nintendo's *Wii Fit* and *Let's Yoga!* have been around for years, wellness gaming concepts are suddenly getting far more interesting and complex. Improving health behaviour is a massive

CASE STUDY

Han Wen,
director of internet
marketing, Clarins

We recognised the gamification trend in the digital social world and felt the need for Clarins to be where our customers are. Our target audience is women over 25 who are interested in spas and beauty products. We chose Facebook because the platform is huge – it has an estimated 900 million users, half of whom are regular social game players. In addition, social discovery – discovering a game via friends – enables games to grow quickly without a large marketing budget.

As Clarins was the first in the beauty industry to create a completely branded social game, we thoroughly researched online and social gaming trends as well as PC, console and hand-held games to figure out what makes a game great. We also partnered with FreshPlanet because of its expertise in developing casual games.

We've implemented all the standard features of successful social games in Spa



Clarins was the first in the beauty industry to create a completely branded social game

Life – including rewards, challenges and leader boards. Our goal from day one was to create a fun and engaging game, so we

decided against features that require the player to perform any specific action – such as watching brand advertising or making a purchase – to progress in their game play.

Since the launch in September 2011, we've had more than 1.1 million unique players and over 120,000 likes.

Spa Life, on Facebook, is a game where players manage a spa of their own design to attract customers with the best treatments while working with limited resources. Details: <https://apps.facebook.com/spa-life>



Deepak Chopra has launched *Leela* a meditation game for Xbox and Wii Kinect – he wants to use the addictive nature of video games to engage more people

▶ US\$2.5 trillion (€1.9tn, £1.5tn) opportunity says digital marketing expert Shuan Quigley in an online blog Can Games Fix American Healthcare? With stakeholders including hospitals and doctors, insurance and pharmaceutical companies worldwide, the medical establishment is getting involved too.

The leader in this movement is the US-based Games for Health project, which brings medical professionals and game developers together to study how cutting-edge games – such as exergaming, physical therapy, biofeedback, nutrition and emotional health games – can be an innovative force in improving people's health and wellness.

World-renowned medical institutions, like the Mayo Clinic in the US, are holding conferences on topics such as Games as Life-Changers. Elsewhere, insurance giant Aetna has partnered with wellness game developer MindBloom to launch *Life Game*, designed to make it fun, rewarding and social for members to achieve wellbeing goals.

SuperBetter (opposite) is a new game from SuperBetter Labs, a digital serious games company. Its goal is "to turn everyday folks into superheroes for health," and revolves around a social platform that allows people to recruit their friends, family and physicians as allies in their quest for wellbeing.

Sites like the US-based HealthyWage.com allow dieters to bet their money (and profit nicely) if they lose weight. *Nike+*, *FitBit* and other GPS- and bio-based fitness tracking apps allow exercisers worldwide to archive



their workouts and compete in online network challenges. *Skimble*, a mobile platform that schedules short workouts into a busy day, shares people's progress socially on Facebook and Twitter, etc. *OptimizeMe* lets users dish out and accept physical challenges.

Given their massive healthcare costs, corporations will continue to ramp up games. For instance, more US enterprises are partnering with companies like Keas, which offers employee wellness programmes – getting staff to eat better and exercise – through a live social media and virtual gaming mix.

SPA MOVEMENT

We're beginning to see some gaming movement in the spa/wellness industry. Mind-body guru Deepak Chopra has launched the meditation game, *Leela*, that uses 43 interactive exercises, focusing on the body's seven energy centres, to relieve stress.

Keas uses social media and virtual gaming to create employee wellness programmes (left); the *OptimizeMe* app is focused on setting and accepting physical challenges (right)

Chopra spent three years designing *Leela*, and has explained that it was the addictive nature of video games that attracted him, allowing his philosophies to reach and engage far more people. Meanwhile, US destination spa Canyon Ranch – which already offers the *360 Well-Being* iPad apps focused on fitness, meditation and healthy cooking – could easily transform its apps into spa/wellness games by adding layers such as challenges, rewards and a social network.

Online wellness gaming is projected to generate US\$2bn (€1.5bn, £1.2bn) in revenues by 2015, according to digital media delivery specialists RealNetworks. The challenge for the spa industry will be to create truly engaging games that creatively connect their clients to the spa's programming, experts and special community, either by using or customising third-party gaming platforms or designing their own. And while I have mostly focused ▶

Improving health behaviour is a massive US\$2.5 trillion opportunity... stakeholders already include hospitals and insurance and pharmaceutical companies



The *SuperBetter* online wellness game launched in March and in the first two months 20,000 users had registered – most were females aged 20-50

Spas could use game elements – like tracking progress – to make clients feel like every visit is a step towards a serious and tangible improvement in their lives

CASE STUDY

Chelsea Howe,
director of design,
SuperBetter Labs

Game designer Jane McGonigal came up with the idea for *SuperBetter* when she found herself struggling to recover from severe concussion. It's about helping players to achieve health and wellness goals – most commonly weight loss, healthier eating, regular exercise, stress reduction and better sleep – in their real lives and not just in a virtual world.

It draws on core online gaming mechanisms – social involvement, overcoming obstacles, feedback and tracking progress – to help players achieve their goals. They recruit allies, complete quests (steps to help them achieve goals), battle bad guys (things standing in their way), and activate power ups (boosts to keep them motivated). The game was designed to increase players' resilience – their ability to stay optimistic, curious and energised in the face of challenges – and McGonigal thinks spa consumers would find this attractive.

The game launched on 9 March and had 20,000 users in the first two months. It



Chelsea Howe

SuperBetter could help spas customise their services once a client leaves, says Howe

currently has slightly more female players than male, mostly aged 20-50.

Spas can use *SuperBetter* as an additional resource for clients who are looking to achieve personal health or wellness goals. Operators can also create their own Power Pack to complement their brand, product philosophy and approach to health and wellness. Alternatively, SuperBetter Labs has developed Power Packs that blend in-game content, scientific research and expert advice from leading doctors, psychologists and researchers.

In the past, a customer might leave a spa with recommendations to improve their daily lives. However, games like –ensure that these recommendations won't get lost or forgotten.

Right now, most people play games in brief spurts throughout the day; online or on their phones. Most spas have few – if any – offerings that are accessible on the go and take less than five minutes. By integrating games into their repertoire – to induce feelings of relaxation, comfort, serenity and confidence, just like spa services do – spas can integrate their programmes into client's lives even after they leave the building.

In addition, spas could use elements of games – like tracking progress towards a bigger goal or giving clear feedback – to make clients feel like every visit is a step towards a serious and tangible improvement in their lives. Instead of just arriving for a treatments, clients would feel like they're starting a journey towards a lifestyle that is more mindful, stress free and focused.

Howe has headed up the design of SuperBetter for the past 10 months and has just received the 2012 Rising Star Award from Women in Gaming. Details: www.superbetterlabs.com

Whether online or off, spas need to realise that they have a strong advantage and opportunity in wellness gaming

► on online wellness gaming, they don't have to be online to be powerful: think of the many engaging ways spas could integrate games and gaming mechanisms, rewards and social contests and challenges into their real-world programming. The branded Biggest Loser weight-loss spa resorts in the US, which are based on the social, challenge-focused premise of the popular TV show, launched in 2009 and are now opening their third destination in New York state.

Whether online or off, spas need to realise that they have a strong advantage and opportunity in wellness gaming, because the



Online wellness gaming is projected to generate US\$2bn in revenues by 2015

work they do forges real and powerful connections with – and between – guests. These connections are far more real than what's offered by most existing generic, online wellness gaming communities.

In our *SpaFinder Trends Report* we also note that online gaming is part of a wider

trend we see percolating in the spa industry: spas extending their connection to customers, to move beyond the sporadic visit model and establish programmes to forge longer-term, more profitable relationships. ●

See p12 for a biography of Susie Ellis and p52 for our interview with her.

CASE STUDY

Ian Bogost, video game designer, philosopher, critic and researcher

Role playing is the most compelling component in games – there's something intrinsically appealing about being someone else whether you're a space marine or just a farmer. But what makes games different to any other media is having a response to a choice you make and to see that decision matter inside a simulated environment.

There are other gaming elements such as presenting a challenge, socialisation, rewards and status (think scoreboard). And there's a trend – especially in marketing – to extract these features and apply them to other online and offline services. For example, collecting rewards for using a service or distinguishing loyal customers on a leader board. Yet these elements are secondary systems that only really matter if they're connected to a primary system (a game) that provides that compelling experience.

There's a lot of disagreement about the gender dynamics in games too. One



Ian Bogost



Games for fitness will continue, with programmes such as *Nike+*, says Bogost, but there's an emerging trend towards relaxation and meditation games

argument is that men are motivated by competitive games and women by collaborative or social games. But it's hard to know how true these claims are as they're usually the result of small studies and are very generalised. Games on Facebook, for example, are mostly social but are played by men and women alike who are of all ages. Yet there certainly isn't the same gender disparity there used to be – over half of adult players these days are women.

Exercise games aren't new, they go back some 25 years and this physical use is

going to continue with games such as *Nike+*. There will also be development in the clinical sector – games produced for medical professionals, such as for training surgeons, or games for patients.

There's certainly an emerging trend in the relaxation/meditation games arena. Deepak Chopra's *Leela* is a good example, while *Wild Divine* with its whole body relaxation training programmes launched in 2002. There are also new styles of games such as PlayStation 3's *Flower* that are less about action and more about contemplation and observation.

If spas tap into gaming, they would need to offer more than just a technical improvement. I could see it working by making a connection between an on-site service and something clients take away that maintains the spa experience in some way.

A professor at *The Georgia Institute of Technology* in the US, Bogost teaches computational and digital media programmes. He's written books on video games and is the co-founder of game design firm *Persuasive Games*. Details: www.bogost.com



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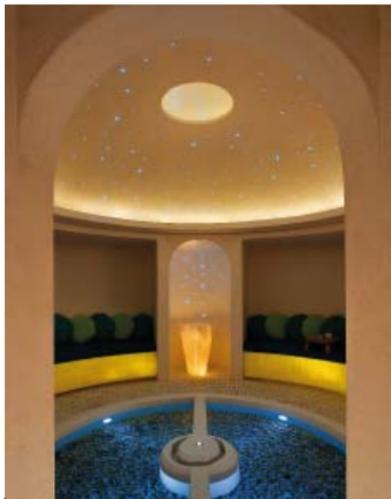
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The spa has a Kneipp pool and relaxation area



While in the Missoni fashion hotel, the spa still reflects the Six Senses style

CUE KUWAIT

“There are two Kuwaits,” says Patrick Taffin d’Heursel, Six Senses Spa director at the new Hotel Missoni in Kuwait City. “There’s the more traditional Kuwait, typified by the burqa, and then there’s the Kuwait that goes to spas. The difference in mindset is hard to attribute to any one thing, but as a general rule those who use our services tend to be more widely travelled.”

This dichotomy is evident just walking around the city. While there are women wearing burqas, in fact it is often the men who are traditionally dressed, with the women adopting a more westernised fashion. Women also work and drive, and overall there’s a relatively liberal feeling, particularly when compared to Kuwait’s neighbours.

Locals are also financially well-off. Around 92 per cent of Kuwaitis work for the government, earning at least KWD800 (US\$2,900, £2,150, €2,750) a month says Gerard Oliver, general manager of the nearby Al Corniche Club Resort and Spa – a facility that we focus more on in part two of our Kuwaiti series.

With working hours also relatively short (rush hour is usually mid-afternoon),

In the first of a two-part series on the Kuwaiti spa market, we investigate the driving forces in the sector and visit the new Six Senses Spa at the fashion-branded Hotel Missoni

Kuwaitis have the time and disposable income to generate a high demand for good quality leisure. And there is, says Taffin d’Heursel, a growing focus on wellness in this leisure time: “I see a lot of Kuwaitis now concerned about their health, obesity, eating properly and taking care of themselves. Everyone wants a quick fix, but they’re learning that you have to change your lifestyle to be able to maintain any benefits.”

DISCERNING CLIENTELE

With the majority of spa-goers being well-travelled, English is the language spoken in the spas – a clear benefit for the therapists at Al Corniche and Six Senses Spa, who have all come from a wide array of non-Arabic speaking countries.

This international perspective has also led to high expectations. Taffin d’Heursel

explains: “Kuwaitis have money, but they don’t just spend it without thinking. They’ve experienced spa standards around the world, so they have high expectations. They’re happy to spend, but only if they feel they’re getting value and good service.”

But while Kuwaitis travel internationally, Kuwait itself is not on the tourist map – a fact Oliver attributes to its dry status; the British Embassy is the only place in the city that is allowed to serve alcohol. As a result, although new five-star hotels are popping up at a rate of “at least one a year” according to Al Corniche spa director Maria Davydova, they are used almost exclusively by a corporate clientele on short business trips from the Gulf region, and occupancy rates are very low.

So what does this mean for a spa such as Six Senses located in a new hotel? “Our business is mostly external, on a day spa basis,” says Taffin d’Heursel. “The hotel is corporate, not leisure, and only about 4 or 5 per cent of hotel guests use the spa and gym.”

Launched in February 2011, it’s the second Hotel Missoni in the world; the first is located in Edinburgh in the UK. Although the 169-bedroom hotel itself was designed by the fashion house designer Rosita Mis-



Spas are popular with Kuwaitis, who have short working hours and high disposable incomes. More of them are taking their wellness seriously

soni – with a very bold, colourful take on interior design – she was not involved with the design of the spa, which opened in June 2011 and which is very much in keeping with other Six Senses Spas around the world.

“Missoni doesn’t have its own spa operation, and it approached us as it wanted a branded offering,” says Taffin d’Heursel. “There are a few small details we’ve introduced to complement the hotel décor – the purple hue of our crystal lamp bases, lighter wood throughout including bamboo flooring – but essentially it looks and feels very much like a Six Senses Spa.”

The spa and hotel are both owned by local investment company Al-Tijari, but are operated as distinct businesses under separate management. Nevertheless, there is still a good level of integration between the two: Taffin d’Heursel, who worked for the Ritz-Carlton before he joined Six Senses, is part of the hotel’s executive team. And, although the spa and hotel have understandably focused on getting their own businesses up and running in their first year of operation, there are already areas of co-operation – the rooftop pool on the spa floor is owned by the hotel, for example, but is also used by spa guests, with poolside catering managed by Six Senses.

SIX SENSES MISSIONI: FACILITIES

Separate male and female spa areas, each with the following facilities:

- Treatment rooms (six male, seven female)
- One dual treatment room (for use by either side)
- Hammam
- Sauna, steamroom, infra-red sauna, experience showers by Hydrotherm
- Kneipp pool and relaxation area

- Consultation room
- Changing facilities

Ladies’ only spa:

- 12-station gym
- Manicure/pedicure area

Mixed-sex gym:

- 16-station gym
- Group exercise studio

GLOBAL BRAND

Six Senses Missoni spans 1,500sq m (16,146sq ft) and encompasses male and female spas (see above) – by law, spas in Kuwait must be segregated, with only female therapists on the female side and vice versa. A total of 13 treatment rooms offer everything from Six Senses signature treatments – holistic, hot stone and Oriental massages – to local favourites such as hammams. Both male and female hammams can incorporate up to three friends or same-sex family members; strangers cannot share the facilities.

While hammam treatments use olive and Moroccan soap, the others use natural, organic Six Senses Spa and Amala (see p58)

product ranges. Both ranges are also sold as retail products, with the spa’s retail to treatment ratio currently around 12 per cent. “We aim for a minimum of 15 per cent, with a target of 20 per cent,” says Taffin d’Heursel.

There’s a mixed gym on the same floor as the spa – open to members only – which looks out over a rooftop pool and the sea. The female spa area also incorporates a small women-only gym. Both are supplied by Technogym and Schwinn.

At the time of my visit in December 2011, there were 70 members paying either KWD175 (US\$630, €475, £388) monthly (no joining fee) or KWD1,200 (US\$4,300, €3,250, £2,650) annually with a KWD50 (US\$180, €136, £111) ▶



Retail accounts for 15 per cent of spa revenue



A mix of Oriental and holistic treatments are offered alongside two hammams – a favourite of locals

► joining fee for access to the gym, pool and classes. Integration between gym and spa is high, however, with members automatically receiving three free massages as well as a wellbeing consultation, personal training session, discounts on food, beverage and retail, and 15 per cent off all treatments. A detox programme, launched in January 2012, also brings spa and gym together, combining workout, nutritional shakes and massages, all tailored to the individual.

"We would like to end 2012 with 200 members – with the attention and care we give our members, we prefer to grow slowly and let them introduce friends and family," says Taffin d'Heursel. Indeed, word-of-mouth is the strongest marketing channel for the spa as a whole, while there are also monthly promotions for non-members: December's was a two-hour massage plus facial for KWD50 (US\$180, €136, £111). "Ultimately though, provided you offer high quality, price isn't a concern for the locals," he adds.

Taffin d'Heursel continues: "We've been open since 24 June 2011, and we currently have 300 or 400 people a month coming exclusively for spa treatments – it's open to non-members as well as members. Fifteen per cent of customers are hotel guests, 15 per cent are members and the remainder comprise day spa visitors/non-members. Overall, around 10 per cent of clients are expats, with the remainder elite Kuwaitis – typically in their 30s, with the gender split around 40 per cent male and 60 per cent female."

But as he explains, the legal requirement to segregate by gender can be a challenge from a staffing perspective: "Getting the male/female ratio right takes a lot of adjusting, not only ensuring we have the right number of therapists of each sex to meet

SIX SENSES SPA: FIRST PERSON EXPERIENCE

Kate Cracknell

Journalist, *Spa Business*

All elements in the Six Senses Spa reception – the lighting, temperature, décor and staff – made for a welcoming feel. And after showing me to the locker room, the receptionist waited for me in the relaxation area to make certain I was comfortably settled.

I had signed up for the holistic massage – the 50-minute KWD30 (US\$108, €81, £67) signature treatment – but my therapist immediately sensed the tension in my back and suggested adding elements of Thai massage.



She also applied the perfect pressure, stopping just short of the pain barrier, so I managed to relax while still feeling the muscular needs of my body had been addressed. A nice extra touch was checking I was happy with the volume of the music.

Showing me out, my therapist recommended an Oriental massage for my next visit before settling me in the relaxation area and bringing me a hot cushion for my shoulders, a towel to keep me warm, and a pot of ginger tea. Altogether, an excellent massage and all-round experience.

demand, but also that their schedules match those of our customers. Around 80 per cent of our customers are walk-in, so you have to know which therapists you need by day of the week and by specific time slot. That can be a hard balance to strike."

All eight therapists have been recruited from other Six Senses Spas, many from Asia. In addition, each month sees a guest practitioner – such as chiropractors and acupuncture – visiting the spa and there is an array of educational workshops on topics such as nutrition.

SETTING GOALS

Key performance indicators at Six Senses Missoni, tracked by GramercyOne's Spa-Booker software, range from therapist productivity and training hours to retail to treatment ratio, carbon footprint reduction and room occupancy. "Our target for 2012 is an average of 31 treatments a day, meaning an occupancy rate of 50 per cent," says Taffin

d'Heursel. "We're almost there, and will soon need to recruit a ninth therapist."

Eight hundred to 1,000 monthly spa visitors is his goal – but there are challenges. "In Kuwait, the term 'spa' means everything from a hair salon or a manicure to a massage. People don't immediately understand the holistic aspect of our offering.

"Having said that, there are huge opportunities in Kuwait. It's a market that's hungry for good, international-quality service and, although we do have competition locally – Al Corniche, for example – the spa market is still relatively under-developed here.

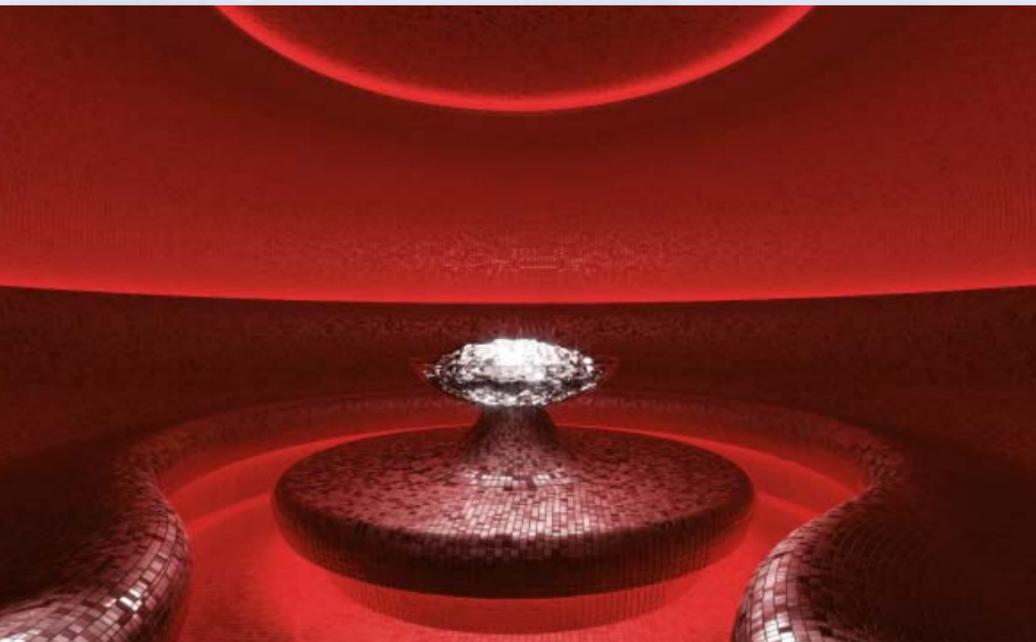
"My ambition is to establish Six Senses as a wellness location in Kuwait. Longer-term I'd also like to work more closely with the hotel – not just in the area of catering, but also looking at the possibility of driving leisure business by, for example, marketing yoga retreats locally and in the Gulf region." ●

In part two of our Kuwaiti series we focus on the Al Corniche Club Resort and Spa.



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We reveal the latest and best equipment for wet spa areas

WATER EQUIPMENT



The station is designed to improve body circulation and sleep

JUST ARRIVED

REFLEXOLOGY STATION, BARR + WRAY

The station: Launched in January 2012, the Reflexology Station provides the bather with a stimulating all over body massage in the water. The user sits within the massage enclosure and air is injected into the base unit and water is pumped through jets in the seat, enclosure walls, foot plate and back plate. The station delivers a vigorous air massage and stimulating hydro massage to the lower legs and torso.

What makes it stand out? The unit combines three popular Barr + Wray products – the Body Massage Station, Foot Massage Jets and the Air Tub – in one to help combat pain, tension, sore muscles and aching joints.

Other key features: Using the principles of buoyancy, hydrostatic pressure and water temperature, the Reflexology Station is designed to improve circulation, stimulate the body and induce sound, restful sleep after use.

Company background: Barr + Wray supplies small independent and large hotel groups, including Sofitel, Hyatt, Taj Hotels and Four Seasons. It has offices in Glasgow, Dubai and Hong Kong and distributes its products worldwide. It has completed projects in Europe, Asia, the Middle East and the US.

What's next? Barr + Wray's pool range, which includes underwater a selection of air recliners and water massage stations, is currently being redeveloped with different materials.

SPA-KIT.NET KEYWORDS: BARR + WRAY



The pool mixes herb-infused water with light and sound therapy

JUST ARRIVED

HEALING LIQUID, INVIION

The pool: The Healing Liquid Pool combines herb-infused water (or healing liquids) with heliotherapy and sound wave therapy, allowing the guest to relax in a clean, sterile freshwater bath and enjoy the full benefits of the bathing experience.

What makes it stand out? The hygienic environment and water vibrations are generated by sophisticated sound wave technology, meaning that pipes and nozzles, which can be prone to bacterial growth, are not needed. Nor is chlorine or disinfectant and dirt from the body is removed through an efficient circulatory system built into underfloor drainage.

Other key features: The pool has been created to use significantly less energy than conventional whirlpools, which require pumps and fans and constant water heating.

Company background: Inviion distributes its products globally and has offices in Europe, Moscow, Cairo, Dubai and Hong Kong. It supplies luxury hotels including Kempinski Hotel Das Tirol, Austria; Hotel Andrus Golf and Spa Resort, Italy; Mohr Life Resort, Austria; and the Panorama Resort and Spa, in Switzerland.

What's next? Inviion is developing new relaxation equipment for 2012.

SPA-KIT.NET KEYWORD: INVIION





18 new rooms all feature the Caracalla and Jouvence

TOP PROJECT: ESPACE HENRI CHENOT

CARACALLA MASSAGE BATH AND JOUVENCE DRY FLOAT, UNBESCHIEDEN

The project: The five-star Palace Merano hotel, Italy, has had 18 of its 24 new treatment cabins fitted with an adapted version of the Caracalla massage bath, as well as a Jouvence dry float bed, as part of an extensive renovation to its Espace Henri Chenot spa this year (see p16).

The equipment: With its curves and deep ergonomically designed tub, the Caracalla is a quiet, simple to use experience bath with a range of intensive health massage programmes. Its 278 nozzles can massage 20 body zones in 10 sequences, from the stimulating energy massage to the smooth relaxing massage.

The Jouvence dry floatation bed is designed for body wraps.

What makes it stand out? Unbescheiden has adapted its baths to the biontologia method used at the spa which specialises in mind body programmes. Based on the principles of Chinese medicine, biontologia follows a three-phase hydro-energetic cure – a powerful underwater massage with beneficial bath additives followed by a relaxing body wrap, enhanced by the Jouvence bed, and then a stimulating jet shower.

Other key features: Unbescheiden offers spa design services and operational advice as part of its strategic partnership with global spa consultancy GeoSpa.

What's next? The baths will be installed in Thalazur Spa, Cabourg, France, during the next 12 months.

SPA-KIT.NET KEYWORD: UNBESCHIEDEN

SHOWCASE

SHOWER CORRIDOR, THERMARIUM

The shower: The Shower Corridor creates a walking experience for guests. After a sauna or steamroom the bather can walk through the shower into a thunderstorm atmosphere created by music, sounds and flashing lights, while water refreshes their body.

What makes it stand out? The combination of special light and sound effects plus shower design and water creates a striking effect. Thermarium says customers new to the attraction are often surprised and stunned from the experiences.

Other key features: Because guests move through the corridor as part of the



The corridor creates a walking experience

experience, the showers don't get blocked with people waiting to use the attraction.

Company background: Thermarium distributes globally and customers include Steiner Leisure, Six Senses Spas and ESPA.

SPA-KIT.NET KEYWORD: THERMARIUM



Shower experiences include Arctic mist, tropical rain and island storm (above); touch screen controls (below)



JUST ARRIVED

EXPERIENCE SHOWER, BRADFORD PRODUCTS

The shower: Bradford's Experience Shower combines water with relaxing chromatherapy, soothing acoustics and rejuvenating aroma. The bather can choose from experiences – Arctic mist, body spray, tropical rain, drench shower and island storm – on a touch screen.

What makes it stand out? The shower is fully custom-designed and personalised to fit any spa concept.

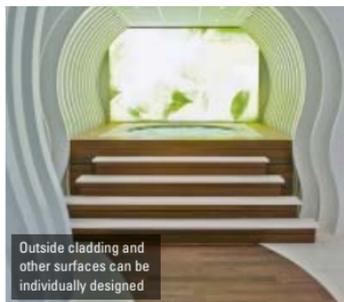
Other products: The next level Experience Shower is the Private Heaven for VIP suites. This incorporates all the functions of the shower as well as features of Bradford's SteamRoom, including steam and a heated bench. It is large enough for two people.

Company background: Experience Showers have been installed in Northern Quest Casino, US and Four Seasons Baltimore, US.

What's next? A more compact version of the Experience Shower is being developed for homes, smaller wellness suites and destination spa guestrooms.

SPA-KIT.NET KEYWORDS

BRADFORD PRODUCTS



Outside cladding and other surfaces can be individually designed

SHOWCASE

THE CUBE, KLAFS

The whirlpool: The Cube has been created to match bathing pleasure with elegant design and modern technology. It can be used in both private and public settings and can accommodate up to five users. It was introduced in 2010 by swimming pool specialists SSF, part of the KLAFS group, and won the *Schwimmbad & Sauna* magazine innovative whirlpools Golden Wave Award in 2011. It has a unique air bubble system and the nozzles are ergonomically designed and placed in hollows for seating comfort.

What makes it stand out?

The round whirlpool sits within a square border and

a steel cubic construction. The outside cladding and other surfaces can be designed with materials and colours to match an existing wellness area. **Other key features:** The water overflow channel is hidden and integrated within the structure. It can either be installed at floor level or free standing.

What's next? SSF intends to launch a new swimming pool safety cover this year. **Company background:**

SSF supplies, designs and builds private and public spas mostly in Germany, Austria and Switzerland, with plans to expand globally. It has worked on the spas at Hotel Eden Roc in Switzerland and the Kameha Grand Hotel, in Germany.

[SPA-KIT.NET](#)

KEYWORDS: KLAFS



The flat design of the shower creates a minimalist elegance

SHOWCASE

TREMILLIMETRI SHOWER COLUMN, GESSI

The shower: This sleek multi-functional shower is made from a 3mm thin strip of reflective steel, which contains the thermostatic mixer handles, a hand shower and an LED light. Different height nozzles produce flat hydro jets and rainfall, and there is an atomizer and a free fall spout for hydro massage.

What makes it stand out? The flat lines and two-dimensional design of the shower are designed to

offer minimalist elegance and are different from traditional showers. Launched in September 2011, Tremillimetri has already won awards globally for its innovative design.

Other key features: The shower is designed to be lightweight and easy to install and to use water efficiently. The LED light is self powered and doesn't need connecting to the mains or a battery.

What's next? Next month, Gessi is launching its iSpa bathroom and wellness fixtures collection, which is simply designed with naturally rounded, soft edges.

[SPA-KIT.NET](#) KEYWORDS: GESSI

TOP PROJECT: RELAIS SAN MAURIZIO

KNEIPP PATHWAY, HAPPY SAUNA

The pathway: The 8m-long Kneipp pathway created by Happy Sauna is a part of the Via del Sale salt, medical and beauty spa which opened in 2009 at Relais San Maurizio – a rejuvenated 17th century monastery – in Santo Stefano Belbo, Italy.

What makes it stand out? The salt-water pathway is said to be excellent for improving blood circulation as well as stimulating the skin. Happy Sauna excavated the pathway deep inside the rock around the monastery,

along with two salt pool caves, creating a unique natural ravine.

Other key features: The pathway and salt pools have chromotherapy.

What's next? Happy Sauna, which designs and supplies spas, is creating a 4,500sq m (48,400sq ft) spa in Moscow, and is also working on another project in Slovakia which is set to open towards the end of 2012.

Company background: Happy Sauna's goal is to create unique spaces to suit the natural environment of the spa site. It has worked across Europe on cruise ships and luxury hotels, including the Grand Hotel Molino



The salt-water paths feature chromotherapy

Stucky Hilton, Italy; Terme di Saturnia, Italy and the Grand Hotel Donat, Slovenia.

[SPA-KIT.NET](#) KEYWORDS: HAPPY SAUNA

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



New SPF50 from Decléor

Decléor has launched two new Aroma Sun Expert SPF 50 sun care products designed to cater for more delicate and mature skin in need of heightened protection. Formulated without the use of mineral oils and colourants, Protective Anti-Wrinkle Cream SPF 50 for the face and Protective Hydrating Milk SPF 50 for the body have been created for all skin types and to help reduce any sun-related reactions.

spa-kit.net keyword **decléor**



Double vision for Biola

Organic face and bodycare company Biola has unveiled two new products. Organic Centella-Coneflower Regenerative Cream has been created especially for extremely sensitive skin such as scars and other areas where the epidermis needs help, while Organic Houseleek Brightening Serum uses houseleek extract for natural brightening plus sea-buckthorn extract to guard against the sun's rays.

spa-kit.net keyword **biola**



Planika setting design on fire

Planika Fires aims to combine contemporary yet elegant international design with the advanced technology of environmentally friendly, smokeless ethanol-based fires. Both wall-mounted fireplace inserts – which can be made to measure – and free-standing, see-through fireplaces run on Fanola*, a renewable green liquid fuel. A long feature fireplace design is available especially for architects and interior designers.

spa-kit.net keyword **planika**



Phytomer launches Hydrasea

Marine skincare company Phytomer has discovered the power of polarised weaving algae water to combat skin dehydration with its latest product. The new Hydrasea Ultra-Moisturising Polarized Water Serum possesses a lightweight texture which has been designed to immediately be absorbed into the skin, leaving it softer, more supple and “revealing a radiant, more beautiful looking complexion.”

spa-kit.net keyword **hydrasea**



KLAFS unveils Casena

KLAFS new Casena sauna has a frameless glass front that reveals an interior basked in golden light thanks to a ceiling with countless light points that's been designed to look like a starry sky. In contrast, the outer and inner cladding are defined by the dark tones of wenge wood. Also, the bench – without a visible substructure – looks as if it is floating on the wall which creates a sense of space.

spa-kit.net keyword **klafs**



Murad's new add-on booster

For professional use only, rather than retail, Murad's Hydrolyte Moisture Infusion product kit can be used to offer clients an additional hydration boost to any Murad facial – to double skin hydration for up to eight hours – at a suggested price of £15 (US\$24, €18). One kit, which is enough for 15 treatments, comprises a 30ml dual-phase Hydro-Dynamic Serum and 15 x 15ml Osmolyte Tonic spray moisturisers.

spa-kit.net keyword **murad**

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



Babor's Skinovage debut

New from Babor is Skinovage PX, a skin-care line to meet the needs of five different skin types. Products include Vita Balance for dry skin; Calming Sensitive for sensitive skin; Perfect Combination for oily and combination skin; Advanced Biogen for tired skin; and Pure for blemished skin. All contain specific actives for each application, plus two star Babor ingredients – Alpine stem cells and OsmoTrec.

spa-kit.net keyword **babor**



Sothys' customised slimming

Sothys has created a Slimming and Firming Collection with four products that work together to combat cellulite. Body Cream Essential 24 is said to encourage weightloss and target cellulite; Reshaping Cream fights cellulite and loss of elasticity; Firming Body Cream helps with stretch marks and decreasing elasticity levels; and Enhancer Body Serum that's designed to increase the efficacy of the other three.

spa-kit.net keyword **sothys**



Premier's free cloud software

Premier Software has introduced a free, real-time, cloud-based booking system to aid the growth of small businesses and independent therapists in the spa, beauty and hair industry. SalonLite cloud-based software offers an efficient and cost-effective scheduling system, plus integrated web booking features. Launched in mid-February, 100-plus operators from across the world are signing up each week.

spa-kit.net keyword **salonlite**



Men only from Shiseido

Offering 24-hour hydration, Shiseido Men Active Energizing Concentrate has been formulated to provide firmness, resilience and an energised look to male skin. Created using Shiseido's Energetic Technology – to support the cells which produce collagen, elastin and hyaluronic acid – the product has been designed to correct the appearance of skin damage caused by factors such as ageing, fatigue and environmental stress.

spa-kit.net keyword **shiseido**



Elemental rejuvenation

Elemental Herbology has introduced what it believes is the future in bio-active anti-ageing skincare with its new Cell Active Rejuvenation Age Support Facial Moisturiser. Combining 12 patented actives, 40 bio-ingredients and six botanical oils, the new product has been designed to provide the ultimate in age-support for mature skin, resulting in improved radiance and boosted vitality.

spa-kit.net keywords **elemental herbology**



Clarin's new shine stopper

Ever Matte, Clarin's new mineral foundation – available in a liquid and powder form – has been created to fight the shine of oily skin in two ways. Chrysin, an extract of blue passion flower, controls the production of sebum at source; while tanaka powder absorbs excess sebum on the skin's surface while restoring a soft, silky feel. Combined, the ingredients, also help to tighten pores and refine skin texture.

spa-kit.net keyword **clarin**

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HAPPY TALK

The argument that positive wellbeing could – and should – be used in the fight against bad health and stress has been highlighted by a UK study*. Scientists from the University College of London have found that the happiest people, who have a more positive outlook, are 35 per cent less likely to die in the short term than those who are miserable.

While many existing studies already show that happy people are healthier, this study is unique because the participants were accurately reporting their mood in real time rather than recollecting them at a later date which can prove unreliable.

IN THE MOOD

The study was based on 3,853 people in total aged between 52 to 79. Using the ecological momentary assessment (EMA) method, they recorded their mood four times in one day – on waking, 30 minutes after waking, at 7pm and when they went to bed.

Each time, they rated the extent to which they felt happy, excited, content, worried, anxious or fearful on a scale of one to four. The first three feelings were combined and described as positive affect (PA) in the results.

The subjects were then divided into three groups based on their PA rankings – high, medium and low. After five years, the researchers followed up with the members of each group to record who had died dur-

Being happy is the key to older adults living a longer life according to a British study based on 3,800 people

ing that time. Factors such as age, gender, depression, health and lifestyle – which might have influenced the results – were taken into account.

DON'T WORRY, BE HAPPY

The group with the highest PA scores had a gradual increase in lifespan it was found. Only 3.6 per cent of the high-PA group had died during the five years. In contrast, 4.6 per cent in the middle bracket and 7.3 per cent in the lower third had died.

In short, the happiest people were 35 per cent less likely to die. Yet more negative emotions did not reverse the trend and had little influence on survival.

"We were surprised that measures obtained over one single day might predict so strongly," said lead author Andrew Steptoe in an article on the health-based website healthymagination.com. Other findings the website highlighted were:

- The happiest people were slightly younger and more likely to be male and married
- Positive emotions overall were lowest at 7am and highest at 7pm
- Ethnicity, paid employment, education and presence of serious disease made no significant difference to PA
- Smoking was less common and physical activity higher among those with higher PAs
- Happier people had higher opinions of their own health

However, Steptoe was keen to point out that the results don't prove that happiness causes people to live longer. He told UK newspaper *The Telegraph*: "The happiness could be a marker of some other aspect of people's lives which is particularly important for health. For example, happiness is quite strongly linked to good social relationships – maybe it's things like that which are account for the link between happiness and health."

He also suspects that biological processes could be at work: other studies have shown that positive moods reduce stress-related hormones and boost the immune system. ●

**Steptoe A and Wardle J. Positive affect measured using ecological momentary assessment and survival in older men and women. PNAS. Vol 108, no 45, November 2011*

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