



SDA

# UNIPRO SPA Industry Research

By MAFED 08 - SDA Bocconi

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## Research Objectives

The **overall purpose of this study** is to provide Unipro with an analysis on the SPA industry major trends and business models on an international level (with France as a benchmark)

This will be done through the accomplishment of **specific goals**:

1. Analysis of trends and business models in top 5 countries
2. Analysis of the best 10 SPAs (from SPA finder)
3. Analysis of SPA in France (visited and observed)
4. Analysis of consumer experience and expectations about SPA (survey)
5. What we learned

## Research Methodology

### 1. Analysis of trends and business models in top 5 countries

### 2. Analysis of the best 10 SPAs

- Desk Research: Internet - SPA sites such as SPAFinder and websites of SPAs, wikipedia, blogs- magazines such as Conde Nast Traveller

### 3. Analysis of SPA in France

- Field Research: Interviews and Observation in Paris and Bordeaux

### 4. Analysis of international consumers expectations about SPA

- Field Research: Surveys: Online survey sent to over 300 people through web forums, social networking sites, SPA related blogs etc. 90 respondents; Focus Group in Milan (October 08)



# Analysis of trends and business models in top countries

## Global SPA overview

96 Million of people go to SPAs regularly World Wide

Global Number of SPAs: 71,600



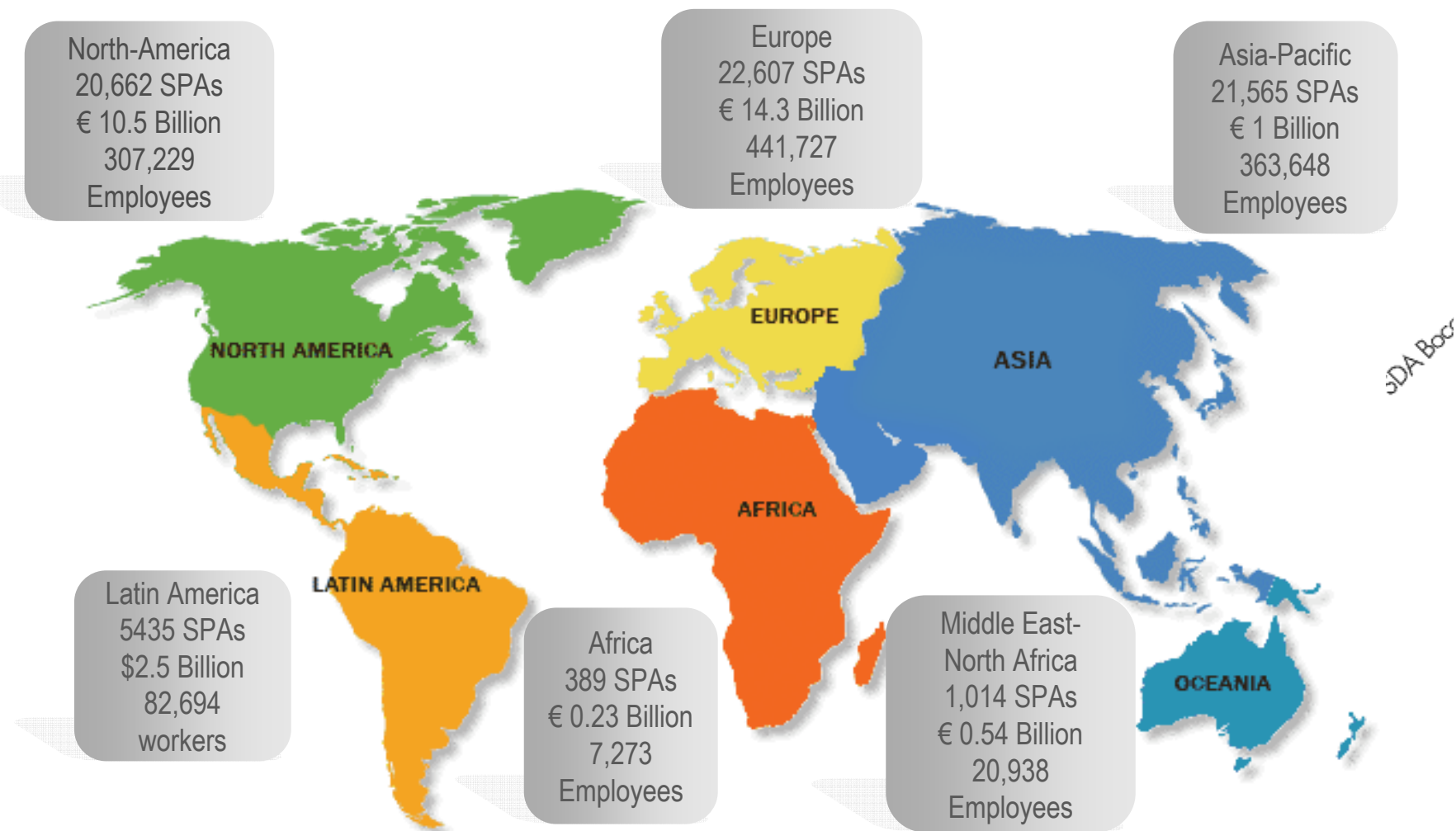
World wide SPA industry worth over € 195 Billion

Source: *European Spa: the Magazine for Spa professionals*, 2007  
<http://www.info-massage.com/Les-futures-tendances-du-Spa.html>

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# Analysis of trends and business models in top countries

## Global SPA overview



Source: European Spa: the Magazine for Spa professionals, 2007  
<http://www.info-massage.com/Les-futures-tendances-du-Spa.html>

Rate 1.32 Dollars per Euro, 30/10/2008)

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## Desk Research (Countries): Methodology

The following countries were selected for desk research as per the first meeting with UNIPRO (strength in SPA market overall and history in SPA or emerging markets)

## USA

- Technology and Med SPA
- Fitness
- Day SPA & Hospitality

### SPA in a few words

*Fitness,  
Beauty, youth*

## France

- Beauty, Body treatments
- Product Oriented
- Cultural Input (Wine)
- Therme/Marine
- Pampering, Luxurious

### SPA in a few words

*Innovative ingredients, Branded*

## Japan

- Traditional Onsen
- Family/Older
- Wine, chocolate pool

### SPA in a few words

*Bath/ Ritual*

## China

- Reflexology, accupuncture
- Emerging market, western
- Tourists
- Chinese medicine

### SPA in a few words

*Luxury, traditional medicine*


## Brazil

- Beauty
- Weight Loss
- Beauty Farm, retreat,
- Technology
- Natura Brand

### SPA in a few words

*Rich, medicine, SPA, sport  
Urban, hotel*

## International overview of SPAs at country level



## Malaysia

- Flower Bath
- Traditional ceremonies
- Natural Ingredients
- Fish SPA
- Mass population, ritual

### SPA in a few words

*Experience, non-exclusive  
to rich*

## Dubai

- Luxury Hotels
- Male SPA trend
- Brand focus
- Fashionable

### SPA in a few words

*Hotel, indulgence, trend*

## Indonesia

- Natural Products
- Unbranded
- Destination, couples
- Tourism

### SPA in a few words

*Natural, health, tourism*

## India

- Tradition in Ayurveda, yoga
- Health, well-being
- Luxury, lifestyle
- Body, mind, wellness

### SPA in a few words

*Tradition, healing, holistic beauty*

## Thailand

- Tradition in massage
- New tourism destination
- Relaxation

### SPA in a few words

*Body, location, Thai  
massage*



# Countries and Business Models: The Americas

## Brazil

- ORIGIN: SPA boom started in the 90's.
- PRIMARY LOCATIONS: SPAs are mostly located in urban areas
- UNIQUENESS: Beauty farms

### **EXAMPLES:**

- Convento do Carmo ( Salvador Bahia) Luxury spa/ Historical site/ L'Occitane
- Costa do Sauipe Marriott Resort & SPA (Bahia) Luxury Resort/Thalassotherapy/Coffee bean treatment
- Copacabana Palace (Rio de Janeiro) Luxury SPA/Tourist attraction/Shiseido, Decleor, Natura

## USA

- ORIGIN: Popular formats have included destination SPAs for wellness and fitness, day SPAs for beauty (youth culture), hotel SPA for relaxation and rejuvenation (leisure and business). Cosmetic technology tradition
- BUSINESS MODEL: Hotel or day SPA, Medical/Cosmetic treatment locations
- UNIQUENESS: Hi -Tech treatments (botox, sculpted tanning) day SPAs with beauty treatments and increasing availability of products outside of spas

### **EXAMPLES:**

- Mandarin Oriental, NY: Luxury Hotel/ City location/ Time rituals, variety of treatments
- Bliss SPA: Day SPA/ City location/ Variety of treatments as well as nailcare, body care (waxing etc)/ Products available in department stores
- ESPA at Aqualina, Miami Beach: Resort/ City location/ Variety of treatments, ESPA products; Exhale/ Day SPA/ City locations/ Wellness with fitness and health as well as facials with laser technology

## Countries and Business Models: Asia

### China

- **ORIGIN:** Reflexology parlors in past. China has a tradition in healing but the spa industry was not as prevalent in the country. Changing times as Chinese travel more and compete with other Asian nations and with an increase in income and changing pace of life
- **PRIMARY LOCATION:** Hotels
- **UNIQUENESS:** Chinese medicine (cupping, accu-pressure and treatments to improve yin-yang equilibrium). Chinese and Tibetan elements add to the uniqueness of the SPAs

#### **EXAMPLES:**

- Evian SPA by Three: Brand/Clarins products and Zen, deep hydration treatments
- Intercontinental: Hong Kong/ Hotel/ Feng Shui friendly spa
- Banyan Tree: Day/ City location/ Ancient healing and special “Five elements” packages

### India

- **ORIGIN:** Ayurveda originated in the South of India in forest and swamplands. Traditionally wellness, yoga, oils, diet and healing have been part of daily rituals and holistic tradition. The tradition of resort and shalas and pilgrimage for wellness and over the years destination resorts and hotels have used the spa tradition.
- **PRIMARY LOCATION:** Hotels and Resorts/ Destination
- **UNIQUENESS:** Ayurveda, yoga and holistic treatments, medical tourism

#### **EXAMPLES:**

- Ananda SPA Himalayas Destination location/ Ayurveda and wellness
- The Coconut Lagoon in Kumarakom Resort/ Destination location/ Ayurveda, yoga
- Taj SPA, Cochin Hotel/ Signature Indian experiences and therapies

## Countries and Business Models: Asia

### Indonesia

- ORIGIN: Historical tradition in spices and natural ingredients for healing
- PRIMARY LOCATIONS: Destination resorts and hotels
- UNIQUENESS: Nature and SPA deep connection. Ingredients

#### **EXAMPLES:**

- Ritz Carlton Bali Resort & SPA-Luxury/Marine thermes/La Mer
- Bulgari Resort-Designer Brand/Balinese Therapies/Bvlgari products
- Angsana Bintan-Luxury-Location/Local ingredients

### Japan

- ORIGIN: Onsen Ryokan/hot springs as popular leisure activity (communal bathing). Shiatsu massage with principles of accu-pressure.
- PRIMARY LOCATION: Hotels or remote locations
- UNIQUENESS: Natural, traditional treatment (water) for health and beauty

#### **EXAMPLES:**

- Utoco Deep Sea Therapy Center & Hotel (by Shu Uemura): Hotel/ Luxury Brand/ Remote location Hotel/Deep mineral sea water therapy
- Otaru Ryotei Kuramure: Hotel/ Remote location/ Natural hot spring bathing
- Hoshinoya, Honshu/ Hotel/ Remote location/ Hot spring/ onsen ryokan "theme park"

## Countries and Business Models: Asia

### Malaysia

- ORIGIN: Historical tradition, balance of harmony of the mind, body and spirit
- PRIMARY LOCATIONS: SPAs are mostly located in big cities but these are also present rurally
- UNIQUENESS: Combine physical and spiritual health

#### **EXAMPLES:**

- Berjaya Tioman Golf SPA-Destination spa/Island/Local brands and ingredients
- Pangkor laut resort-Destination SPA/#1 SPA worldwode/a la carte treatments
- Mandarin Oriental Hotel-Hotel spa/city centre/luxury local ingredients

### Thailand

- ORIGIN: Tradition in natural healing techniques (Thai massage). Hotel SPAs are a relatively new phenomenon since the 1990s after which there was tremendous growth in the industry.
- PRIMARY LOCATION: Hotels and Destination
- UNIQUENESS: High level of service and healing tradition (thai massage, medicinal flora, natural springs)

#### **EXAMPLES:**

- Four Seasons Resort Chiang Mai: Luxury Hotel/ Destination location/ Thai Massage and organic ingredients
- Chiva Som: "Luxury Health Resort"/ Destination location/ Holistic and medicinal treatments
- Six Senses SPA, Evason Hua Hin: Resort/ Destination location/ Men's treatments as well as other traditional treatments

## Countries and Business Models: Middle East

### Dubai

- ORIGIN: Arabic tradition. Recent boom in hotel industry and luxury is making Dubai one of the leading destinations for future SPAs
- PRIMARY LOCATION: Luxury hotels
- UNIQUENESS: Luxury and grandiose, variety of Eastern and Western treatments, some male treatments. (Medical City etc)

### EXAMPLES

- Talise SPA at Madinat Jumeirah, Dubai, UAE Hotel/ Sodashi natural products
- Givenchy SPA (One & Only Royal Mirage hotel) Luxury Brand/ Hotel location/ Givenchy products and treatments
- H2O Male SPA at Jumeirah Emirates Towers Day SPA located in hotel/ For men/ Male treatments

## Countries and Business Models: France

### France

- **ORIGIN:** Treatments were linked to water cures which were very popular between the XI and XIII centuries. Nowadays there is a clear differentiation between: Balneotherapie (equivalent to the Terme in Italy), Thalassotherapie (linked to marine products), SPA (linked to comfort and luxury; involves skin/ beauty/relaxation treatments)
- **PRIMARY LOCATIONS:** SPAs are mostly located in urban areas for Day SPAs and Rural for Destination SPAs.
- **UNIQUENESS:** Strong linkage to beauty and products. Most SPA brands won thier own brand.

### **EXAMPLES**

- Sources de Caudalie: Destination spa/ Vinotherapie/ Caudalie
- Villa Thalgo:Day SPA/Marine products/ Thalgo
- Four Seasons George V: Luxury Hotel SPA/A la carte treatments/ Carita

# Global trends in wellness and in the SPA business

- **Natural** (environment and setting) (e.g. Sources de Caudalie)
- **Organic** (ingredients) (e.g. St. James Albany)
- **Green purification** (mix of organic, natural, in holistic interpretation of SPA) (e.g. Fermes de Marie)
- **Self-discovery and Personalisation** (related to customer service and education) (e.g. Anne Semonin)
- **Service** (SPA as more than just about treatments) (e.g. Omnisens)
- **Uber Luxury** (extremely precious and rare) (e.g. Four Seasons George V)
- **Technological** (cosmetic and medical treatments or highly advanced technical products) (e.g. Valmont)
- **Holistic** (internal and external well-being, beauty improvement and relaxation) (e.g. Comfort Zone)
- **Spa lifestyle** (the Spa experience as part of people lifestyles)

Sources:

<http://spas.about.com/b/2008/01/18/another-take-on-top-spa-trends-for-2008.htm>

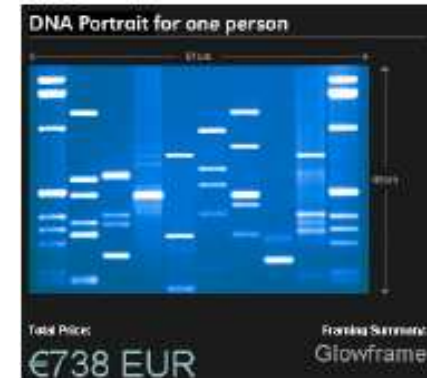
<http://edition.cnn.com/2006/TRAVEL/07/03/spa.trends/index.html>

Interviews to SPA Managers in France

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Organic swimming pool



DNA Portraits - [www.dna11.com](http://www.dna11.com)  
"Frame your inner beauty"

**The new luxury is a personalized retreat**

Travelers want personalized and tailored self-guided discovery of meaningful experience and self actualization, not things



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## Focus on Medi SPA in the US

### Industry

Medical SPA Industry Sales exceeded 1 Billion dollars (2006) compared to \$450 Million in 2004

Medi SPA from **310 in 2006 to 976 in 2007**  
(Source: International SPA Association)



### Consumers

**Baby boomer** population as **core group** of clients  
**Younger consumers** emerging segment (to prevent aging at earlier rate)

**Men for Botox** also showed growth in US

**2008: 20% percent of Botox recipients** will be between the ages of **20-35** ( 8% increase over 2007)

(Source: American Academy of Dermatology's recent study)



## Focus on Medi SPA in the US

### Services

Botox, Injectibles, laser hair removal, IPL, cellulite reduction treatments and aggressive resurfacing techniques

### Quick Fixes

Top five minimally invasive cosmetic procedures for men in 2007:



Source: American Society of Plastic Surgeons

THE NEW YORK TIMES

### Aesticians

Time of “uber-aesticians”

“Technological artillery” helps facialists win client respect

### Recession Considerations

- Downward trend in cosmetic medicine
- **Sept 2008 compared to Sept 2007:**
  - 12 percent decline in cosmetic Botox injections
  - 16 percent decline in September in filler injections that plump up the skin
  - 22 percent decline in cosmetic breast implant surgery
  - 11.5 percent decrease in cosmetic laser procedures

Source: American Society of Plastic Surgeons Survey (385 doctors) & MEDACorp Study (102 plastic surgeons & dermatologists)

## 2. Analysis of the best 10 SPAs *(Ranking by Conde Nast Traveller)*

## Top 10 SPAs (Worldwide)

### 1. ESPA at One&Only Reethi Rah, Maldives



**Destination SPA (9500 Sq.M)**  
**ESPA Holistic, individualised  
programmes**

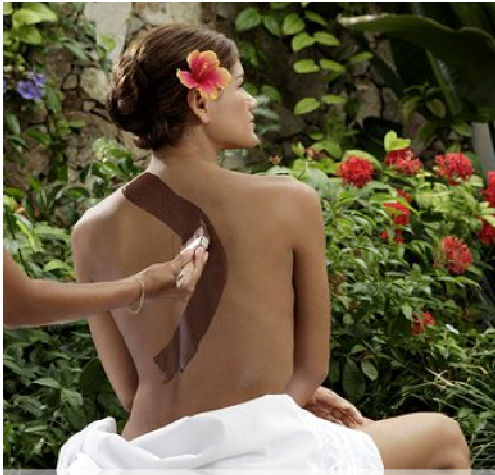
### 2. SPA Village Tanjong Jara Resort, Kuala Terengganu, Malaysia



**Destination SPA**  
**Natural Ingredients**

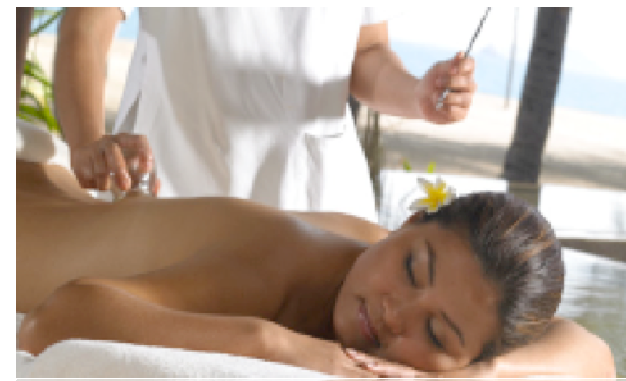
## Top 10 SPAs (Worldwide)

### 3. Esperanza, Los Cabos, Mexico



**Destination SPA**  
**Fresh Indigenous Ingredients**

### 4. Six Senses SPA , Soneva Gili by Six Senses, Maldives



**Destination SPA**  
**Six Senses, Holistic & Wellness**  
**Consultant , Yoga & Tai Chi Classes**



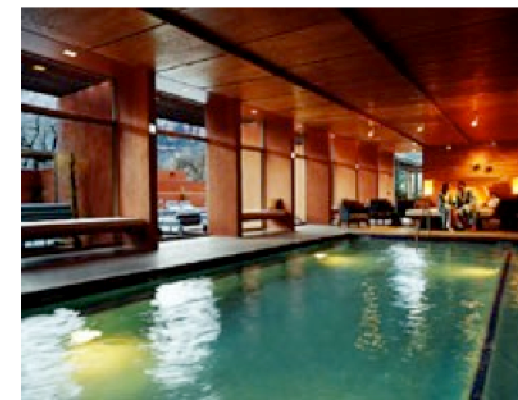
## Top 10 SPAs (Worldwide)

### 5. The SPA , Four Seasons Resort Chiang Mai, Thailand



### Destination SPA Organic Ingredients

### 6. Mii Amo, Sedona, Arizona, USA



### Destination SPA Holistic

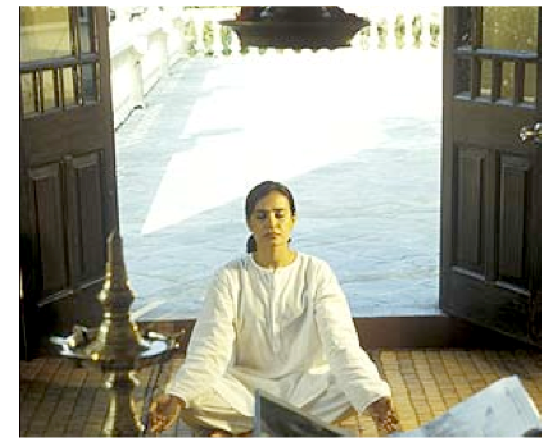
## Top 10 SPAs (Worldwide)

### 7.The Bulgari Hotel SPA , Milan, Italy



**Luxury Hotel SPA**  
**ESPA, Contemporary Well-Being**

### 8.Ananda SPA , Ananda in the Himalayas, India



**Destination SPA (21000 Sq. Ft)**  
**Holistic, Well-being**

## Top 10 SPAs (Worldwide)

### 9. Calcot SPA , Calcot Manor, Gloucestershire



**Private Leisure complex with SPA**  
**Guinot & Aromatherapy Associates**  
**products , Health, beauty, fitness**

### 10. The SPA at Sandy Lane, Barbados



**Luxury Resort/Destination SPA**  
**Traditional cultural therapies, Golf,**  
**Well-being , Anne Semonin**

## Conclusions about international SPAs

- **Trends** There is a notable trend toward organic, holistic, well-being and genius loci (products and treatments from the country)
- **Product** Predominantly, natural ingredients, organic were important particularly in Asia (branded products were not as highlighted here as perhaps in more Western countries or cities). Innovation in treatments, total body experience
- **Services** Geared toward overall well-being and experience as well as staff knowledge since a lot of the top SPAs have holistic treatments (massage, yoga, tai chi etc)
- **Environment** Since most of SPA observed are Destination SPAs, location and beautiful surroundings tend to be part of the overall experience
- **Definition of SPA** Based on the above mentioned, definition of SPA appears related to SPA deliverables (body and mind relaxation and well-being) rather than to the usage of water



## 3. Analysis of the French Market

- Identification of SPA trends and examples in France
- Classic vs New Luxury Mapping
- Staff Measurement

## French Case

### Identification of SPA trends and examples in France

#### SPAs VISITED

**Methodology:** Interviews\*

**Who:** SPA Managers or SPA-In-Charge

**When:** September 23<sup>rd</sup> to 27<sup>th</sup>, 2008

**How:** 30 to 45 minutes interview, SPA tour

**Where:** Paris and Bordeaux

**Number:** 9

#### SPAs OBSERVED

**Methodology:** Observation

**When:** September 23<sup>rd</sup> to 27<sup>th</sup>, 2008

**How:** Casual Visit

**Where:** Paris

**Number:** 9

*Samples and marketing collateral gathered wherever possible*

*\*Note: Questionnaire in final Appendix*

## Interviews: French Case (SPAs Visited)

### Day SPAs:

- Comfort Zone
- Espace Payot
- Omnisens
- Villa Thalgo

### Hotel SPAs:

- Four Seasons George V
- Le Meurice
- Le Bristol
- St.James Albany

### SPA Level:

**Location:** Paris 75008

**Type:** Day SPA

**Ambience:** Modern Decor, warm colors, gentle music, polite staff

**Services:** Face (anti-aging), body (slimming), scrub (hand and feet) and massage

**Uniqueness:** Lifestyle concept, Internationally available, Product line



### Product Level:

**Brand Name:** Comfort Zone

**Special Ingredients:** Natural, oil and vegetable ingredients

**Function:** Relaxation, wellness feeling, toning

**Distribution:** Comfort Zone SPA' and other SPAs around the world who use the brand

**Base:** Natural based, constant R&D to ensure best natural ingredients/components

**Best Seller:** Tranquility Line



**Key learning:** Lifestyle Concept to be adapted worldwide

**SPA Level:****Location:** Paris 75008**Type:** Day SPA**Ambience:** Modern stone décor, Hip music Warm Modern lamps and dim lighting, indifferent staff**Services:** Massages (toning, reflexology, energetic), gym, pool**Uniqueness:** Design, ambience, lighting, variety of services**Product Level:****Brand Name:** Payot**Special Ingredients:** Natural, oil and vegetable ingredients**Function:** Well being, anti-aging.**Distribution:** Exclusive to SPAs or socialized retailers that sell the brand worldwide**Base:** High-Technological biological products and application techniques**Best Seller:** Face lotion**Key learning:** Investment in infrastructure & technology

## Visited: Four Seasons (George V)

### SPA Level:

**Location:** Paris 75008

**Type:** Hotel SPA

**Ambience:**

- 18th century design consistent with hotel design. Gentle Music playing.
- Warm and cozy atmosphere. Sophisticated and fine living style and clean environment.
- Classic Renaissance style colors. Polite reception (note: SPA in-charge did not meet with us at the time requested).

**Services:** Massages (relaxing, energizing, specific, deep tissue), body treatments, facials. Pool located near SPA area.

**Uniqueness:** Luxury hotel atmosphere with private SPA and services available in the rooms upon request. Male treatments offered as well.



### Product Level:

**Brand Name:** Carita and other brands

**Special Ingredients:** Some ingredients were rose petals, orange flower, chocolate, rare oils and Karite butter.

**Function:** Relaxing and luxury

**Distribution:** Worldwide hotel presence

**Base:** Mostly natural

**Bestseller:** Not determined



**Key learning:** Uniqueness of treatments not relevant in luxury hotel. Instead hotel brand, location, classification (number of stars) and heritage has more relevance



### SPA Level:

**Location:** Paris 75008

**Type:** Hotel SPA (located next door to hotel)

#### Ambience:

- Modern, simple, minimalistic décor.
- Creamish lighting with bamboo and orchid, small waterfall at entrance. Products of Anne Semonin and Lise Wattier (make-up) displayed at entrance.
- Light music.
- Polite and helpful staff.

**Services:** Massages (relaxing with oil, Swedish, Shiatsu but no Thai since it is not without oil), natural therapies, facials. Pool at hotel with massage room. 5 elements treatments.

**Uniqueness:** Consultations for facials to create beauty prescriptions.

### Product Level:

**Brand Name:** Anne Semonin (for SPA products). (Lisa Wattier for make-up)

**Special Ingredients:** Combination of trace elements and essential oils

**Function:** Anti-wrinkle and hydration.

**Distribution:** Exclusive to spa or specialized retailers. No online sales of product on website (note: Anne Semonin website linked to from hotel site).

**Base:** Natural

**Bestseller:** Masque Mineral and Trace Element products

Visited: Le Bristol



**Key learning:** Exclusivity of brand to attract specific clientele

### SPA Level:

**Location:** Paris 75008

**Type:** Hotel SPA

**Ambience:** Modern wooden asian style decor inside a traditional Palace. Neutral colors, very polite staff.

**Services:** Massages (relaxing and deep tissue), facials, gym

**Uniqueness:** Reputation, location, product brand used

### Product Level:

**Brand Name:** Valmont (Face), thermes Marins de Saint Malo (body), By Terry (make-up)

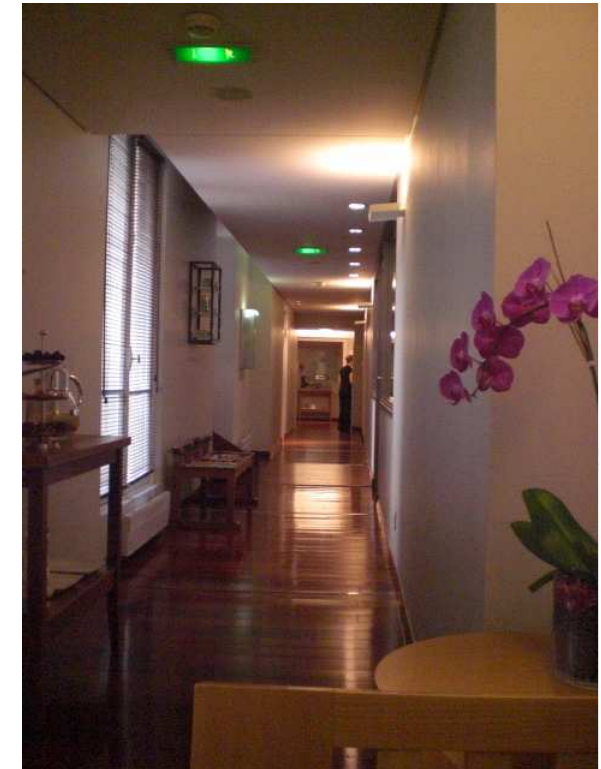
**Special Ingredients:** DNA/RNA system (no bio products) high-tech products, anti-aging.

**Function:** Anti aging without surgery

**Distribution:** Exclusive to SPA's or specialized retailers that sell the brand worldwide

**Base:** High-Tech products, Focus on R&D

**Best Seller:** Face Lotion



**Key learning:** Exclusivity of brand to attract specific clientele



## SPA Level:

**Location:** Paris 75012

**Type:** Day SPA

**Ambience:**

- Modern, simple décor with light music (Pale blue and whitish décor similar to brand colors)
- Clean space.
- Located in a building (could be office building) in Bercy village.
- Polite and helpful staff.

**Services:** Massages (relaxing, Swedish etc) and body treatments, lounge area for relaxation.

No pool.

**Uniqueness:** Special packages such as SPA by Night, brunch and SPA, SPA and Teatime, Zen SPA. Food with treatments.

## Product Level:

**Brand Name:** Omnisens

**Special Ingredients:** 85% of their products are natural and without silicone and paraben.

The products contain French marine seawater from Bretagne.

**Function:** Anti-aging and moisturizing

**Distribution:** Available in other hotels and dept. stores as well as at the SPA.

**Base:** Mostly natural

**Bestseller:** Reflets de Soin (moisturizing oil and perfume)



**Key learning:** Promotion, Marketing to differentiate in middle range of SPAs

**SPA Level:****Location:** Bordeaux-Aquitaine**Type:** Day SPA**Ambience:** Sophisticated country style, focus on vineyards and green space, very natural barrel-esque theme and welcoming staff.**Services:** Half a day minimum treatment based on grapeseed products, face, body, pool available.**Uniqueness:** Ingredients of treatments, theme, landscape and Chateaux next to it.**Product Level:****Brand Name:** Caudalie**Special Ingredients:** Natural, fruit based products and also wine based products**Function:** stress relief, relaxation and blood circulation**Distribution:** Widely available in Pharmacies across France and in special department stores across Europe and USA.**Base:** Natural based products no conservants**Best Seller:** Cabernet Scrub as well as new anti aging line**Key learning: Unique Ingredient, Wide distribution**

## SPA Level:

**Location:** Paris 75001

**Type:** Hotel SPA

**Ambience:**

- Boat themed entrance.
- Woody décor.
- Focus on display on products.
- Warm atmosphere.
- Located in basement.
- Nice pool space.
- Clean but small rooms (bathrooms not so clean or hygienic)

**Services:** SPA massages including nutritional guide (reflexology, cranial, modeling, sculpting), body treatments.

**Uniqueness:** Ethnic massage (Thai, deep tissue, Chi Nei Tsang). Highly qualified staff for special treatments. High technology.

## Product Level:

**Brand Name:** Dr. Hauschka, Les Luneides (oil, chocolate), Harnn

**Special Ingredients:** Natural base.

**Function:** Mental and physical equilibrium

**Distribution:** Products available worldwide. No online sales.

**Base:** Technology

**Bestseller:** Not provided.

**Key learning:** Skilled medical expertise (staff), Bio focus

Visited: St. James Albany



### SPA Level:

**Location:** Paris 75008

**Type:** Day SPA (located near hotel but few clients from hotel).

**Ambience:** To be renovated and new location will be near Eiffel Tower. New design will have different design with a more modern approach. Currently, décor is in boat theme with no music, bright lighting, products displayed near reception area, not very clean due to renovation. Staff was polite and helpful.

**Services:** Massages, face, relaxation, slimming with most water related treatments. Aqua gym and pool at premises.

**Uniqueness:** Water and marine related treatments, algae for skin regeneration

### Product Level:

**Brand Name:** Thalgo

**Special Ingredients:** Marine water and algae

**Function:** Anti aging

**Distribution:** Select distribution; Online Sales for UK, Shipment of products overseas for some special customers

**Base:** Mostly natural

**Bestseller:**

Soin Aquarelle (with marine algae with re-mineralizing)










- Soin Hydratant (marine extract, rehydrating)

- Soin Equilibrium (regeneration of skin with algae)












**Key learning: Unique ingredient, Selective distribution**



	Description	Unique reason why
	Parfumer origin High-end Exclusive brand Limited distribution.	High perfumer heritage allows high positioning in recent SPA venture Rose essence for products
	100% natural ingredients Atmosphere & ambience Good service	Original concept of 5 continents
	Reputation for high quality products Anti-aging and slimming products Modern setting	Cosmetic Brand High technology Environment friendly
	Commercial brand Country-wide distribution in France Medical studio setting	High technology Medical research Accessible
	Commercial brand Beauty salon Hamam Decleor brand	Mixes water area with regular hair salon
	Glamour cosmetic brand Exclusive distribution Heritage	Brand Heritage as perfumer French Luxury
	Cosmetics Science and beauty	Brand and Tradition High technology
	Excellent reputation in France Online sales Stone/vegetation setting	Natural ingredients
	Value for money Location Customer service	Digi-esthetique technique

# Summary of Observed SPA

SPA									
<b>Strength*</b>	Heritage	Location, Brand	Service	Brand, Ambience	Ambience	Brand, Ambience	Treatments	Ambience, Brand	Heritage
<b>Weakness*</b>	Treatment	Treatment	Ambience	Heritage	Service	Location	Ambience	Location	Treatments

## \*Description for above factors

**Location:** Prime city location or unique destination location

**Brand:** Presence of special brand name products

**Heritage:** Tradition in SPA

**Ambience:** Attention paid to space and design

**Service:** Qualification of staff and knowledge as well as customer service

**Treatment:** Width of treatments

# Summary of Observed SPA

SPA									
Strength*	Treatment	Brand	Location	Brand	Treatment	Treatment	Treatments <sup>i</sup>	Location	Ambience, Heritage
Weakness*	Ambience	Ambience	Heritage	Heritage	Ambience	Heritage	Heritage	Heritage	Treatment

## \*Description for above factors

**Location:** Prime city location or unique destination location

**Brand:** Presence of special brand name products

**Heritage:** Tradition in SPA

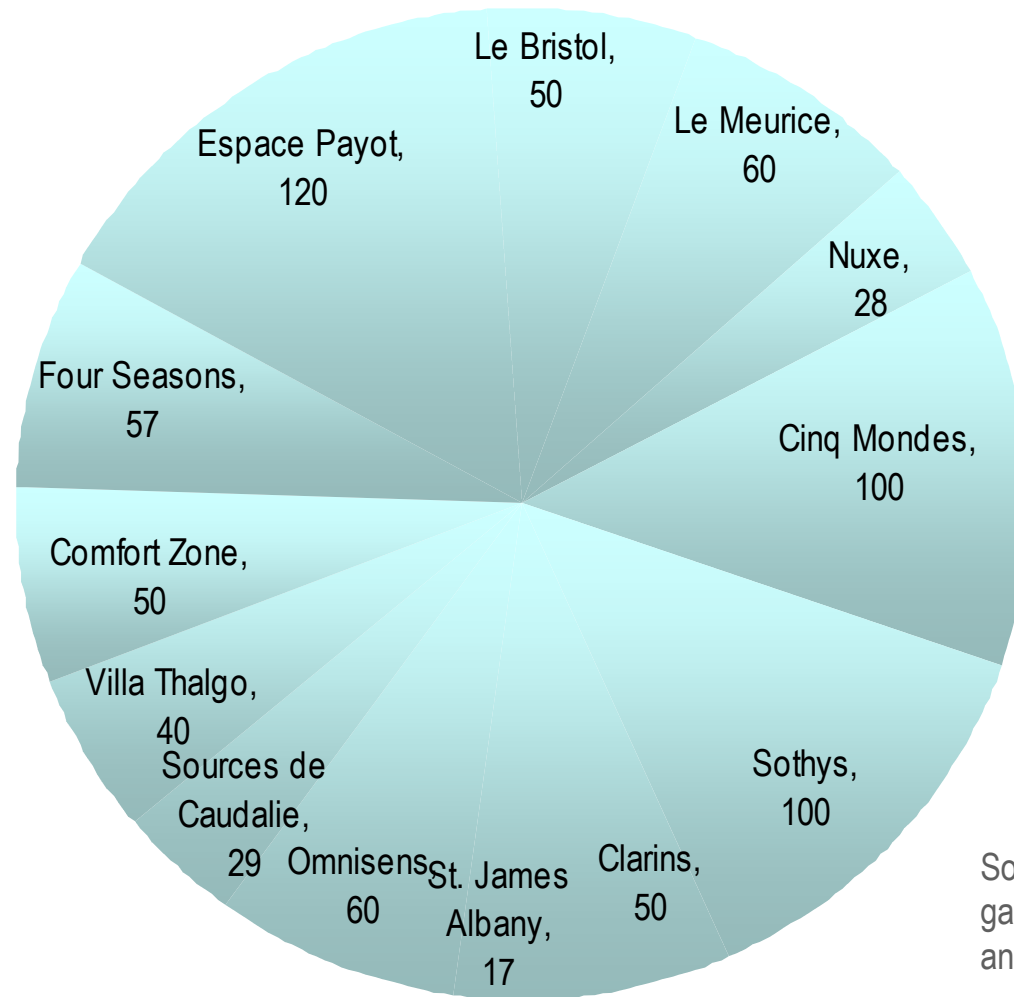
**Ambience:** Attention paid to space and design

**Service:** Qualification of staff and knowledge as well as customer service

**Treatment:** Width of treatments

# Staff Measurement (France)

SQM/N. of Employees



Source: Based on data gathered through interviews and observation.

Average= 59 sq.m per employee

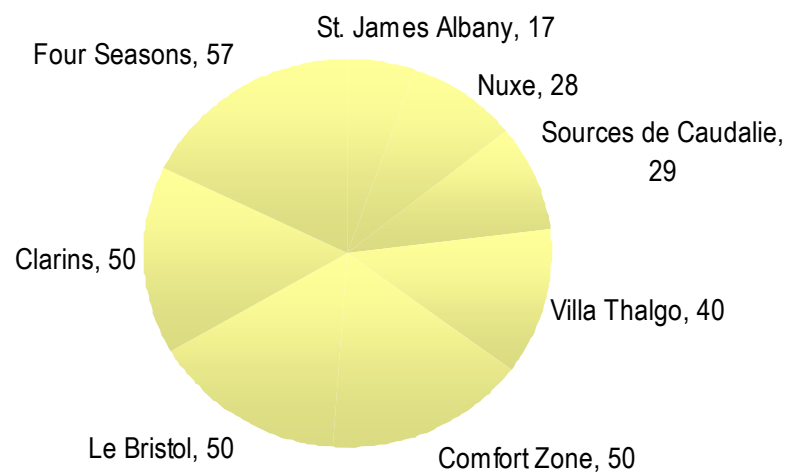
i.e. For every 59 sq.m there is 1 employee meaning that on average a company wanting to set up a SPA should consider hiring 1 employee per every 59 sq.m of space.



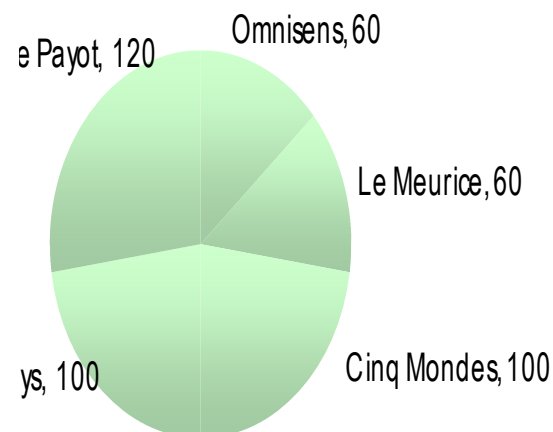
# Staff Measurement (France)

Average= 59 sq.m per employee

Below Average



Above Average



Source: Based on data gathered through interviews and observation.

## Conclusions. The concept of SPA in the French Market

- Day SPA as key format but different approaches to it (from heritage luxury to modern luxury)
- Relaxation is the reason why
- SPA beauty brands/products
- The brand is key
- Location
- Use of natural ingredients



1) How often have you been to a spa in the past 2 years?

- ☐ 1 to 5 times ☐ 5 to 10 times ☐ 10 to 20 times ☐ 20 to 30 times ☐ More than 30 times ☐ Never

2) How much time do you spend on average in a spa?

- ☐ 2 to 5 hours  
☐ Week  
☐ Less than 2 hours  
☐ 1 day  
☐ Weekend

☐ Other:

3) Who else in your family visits the spa regularly?

- ☐ My wife  
☐ My grandparents  
☐ My teenage kids  
☐ My babies  
☐ My parents  
☐ My husband

☐ Other:

4) What 3 words do you associate with spa?

5) Please name the spas (and locations) you have visited most often:

6) Three words to describe your favorite spa would be:

7) How did you hear about your favorite spa?

- ☐ Through magazines  
☐ I just walked into the spa  
☐ Through movies/TV  
☐ Through friends/family

## Survey Format

<https://www.formspring.com/forms/?342255-kYMKxxK8YI>



Please provide us with your feedback about your spa experience  
 by completing the following brief 5 to 10 minute survey.

We thank you for your insight!

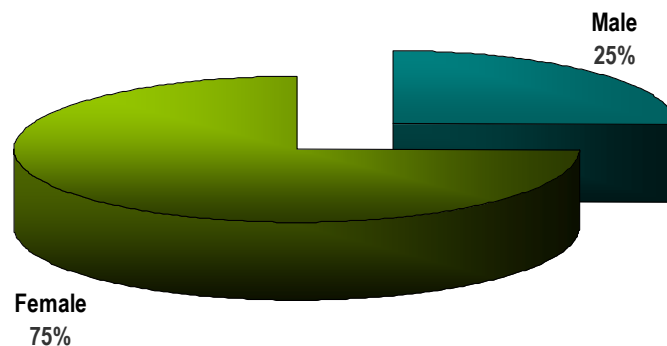
Next >

### Questions about SPA visit:

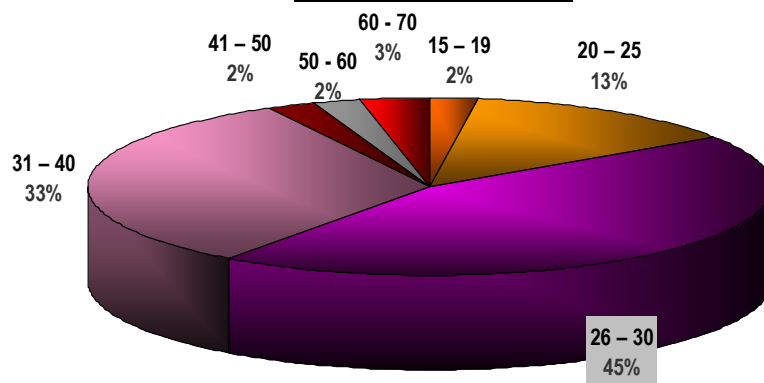
- with whom?
- time spent?
- frequency?
- preferred treatments?
- average expenditure?
- reasons for visiting a SPA?
- expected services

The survey was placed online and built through formspring.com and sent to various networks, spa groups, social networking sites such as facebook and asmallworld, etc. It was conducted from beginning of July to mid- October, 2008.

Gender of Respondents



Age Range of Respondents



The largest part of our sample (58%) is made of young (20-30) international people

## Survey (Global) Respondent Profile

90 respondents

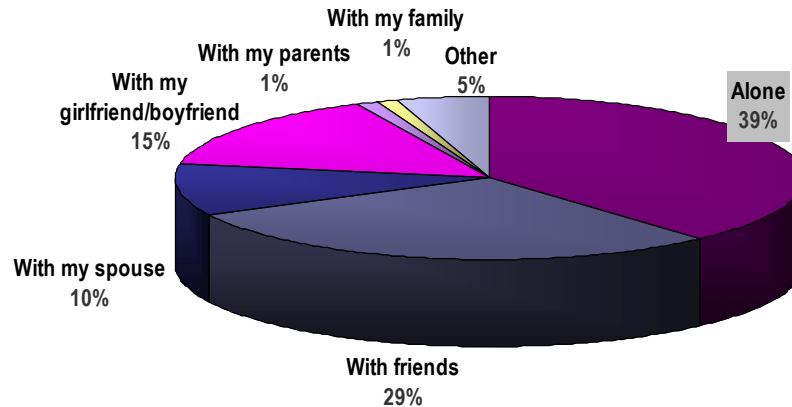
Top 3 countries of respondents: Italy (16%), America (8%), Germany (8%)

Students (37%) or Professionals (71%)

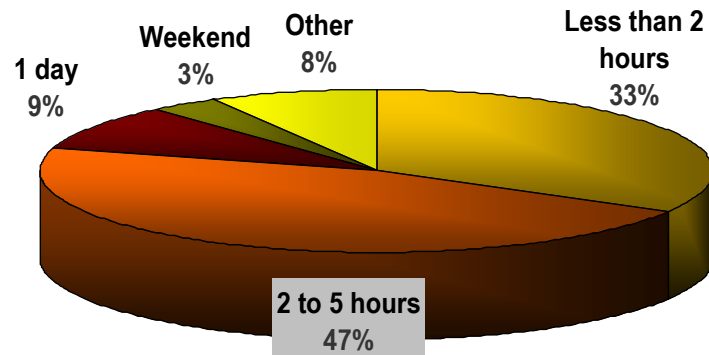
5% of Professionals were in Marketing and 5% from HR. The remainder professions were less than 5% and ranged from IT to banking to law etc.

2% of respondents were homemakers.

Spa Visit: With Whom



Spa Visit: Time Spent



## Survey (Global) Key Findings

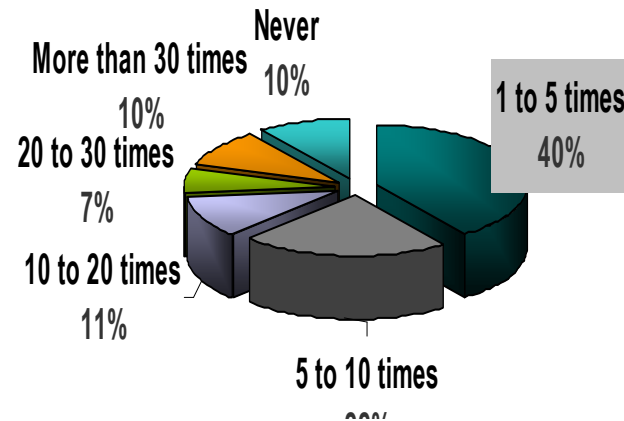
Majority of respondents visited the SPA alone to relax, but also with friends for fun.

Most respondents spent either 2 to 5 hours (47%) or less than 2 hours (33%) at SPAs. Not many respondents visited SPA for weekends.

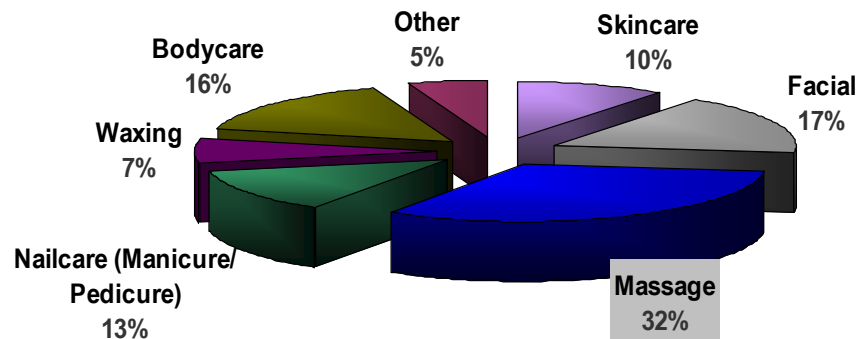
SPA responses regarding SPA type showed that Day SPA (31%) was the most mentioned, followed by in a luxury hotel (in a city) (21%) and in a luxury resort (18%). This shows the relevance of the Day SPA and luxury hotel format.



### Spa Visit: Frequency



### Preferred Treatments



## Survey (Global) Key Findings

Most respondents visited SPAs 1 to 5 times in a year (40%) followed by 10 to 20 times (11%) and more than 30 times (10%). Since overall relaxation was considered important at SPA, perhaps time could be an issue for visiting SPAs often and thus limited the number of visits in a year.

Preferred treatment overall was Massage (32%)

Based on the options provided in the survey, top 3 reasons to visit SPAs was “to relax,” “to relieve stress” and “indulgence” indicating the importance of a relaxing experience and pampering in SPA.

Top Customer Service Requirements included “Polite and Welcoming Staff” and “Knowledge of products/services”. The importance of service and experience are indicated by these results and making service a KSF for SPAs

## Survey (Global) Key Findings

Most (62%) of the respondents heard about SPAs through friends and family. This indicates an importance of WOM as a communications tool for SPAs

SPA Expenditure on a yearly basis was primarily between \$100 to 500. Primarily most respondents visited SPAs 1 to 5 times a year and thus, there is a potential to increase SPA spending through improvement in experience and above mentioned tools.

## Focus Group

Held in: Milan on October 1st 2008

Participants profiles:

- 7 Women; 1 Men
- Age: 20 to 40's
- Countries of respondents:
  - China
  - France
  - Germany
  - Italy
  - Peru
  - USA

Duration: 75 minutes

Key questions posed to the group:

### **Exposure**

Have you ever been to a Spa and if so how many times, location, average time you spent.

### **Products and treatments**

Why did you go to the Spa?

Were you driven by the products used or mostly by the types of massages/treatments offered?

### **Expenditure**

How much do you normally spend at a Spa?

### **Branding**

Was the brand important when deciding which Spa to go to? Why? (quality, price etc.)

### **Personnel and Service**

What would make you a loyal Spa customer?

### **Perception**

What is your perception of French , Italian and International Spas?

### **Trends**

What do you think will be the Spa of the future? Why?

## Focus Group Main Findings

### Definition of SPA:

Not necessarily related to Water,  
minimum of 250 sqm, space for  
treatments + sauna/hammam

### SPA and Branding:

Overall SPA brand is more relevant  
than individua product brand.

Mentioned brands: **Bvlgari, Bliss,  
Nuxe, Guerlain**

Women notice brand more than  
men who are more interested in  
overall treatment and atmosphere

### Prior SPA Exposure

Consumer goes mostly with friends  
for fun

Time is a luxury and is needed for  
full relaxation. Makes no sense to go  
to SPAs for less than 2 hours

### Personnel and Service:

Service- Key factor in all  
Childcare and Children space is  
not relevant.

Loyalty depends on service  
Food has to be healthy: fruit, nuts,  
tea

### SPA expenditure:

Mminimum of 100 Euros  
but roughly around 250  
Euros (depends on brand)

### SPA future and trends

Design of environments is the new trend

More options: budget line vs a more  
expensive and glamorous choice

Limited purchase, waiting list for products  
Exclusivity

Product range made to measure for the  
client

Airport and cruise spa

### Products and treatments

Rituals are very important and it is  
what mostly relaxes

Cosmetics product employed during  
the treatment seem not so much  
relevant

### Italian, French and International SPA's

France:

Brand is very important. Countries  
of the future: **Turkey, Portugal,  
France, Italy**

## Focus Group Conclusions

**New luxury = time for oneself**



**SPA= new luxury=experience=relaxation**

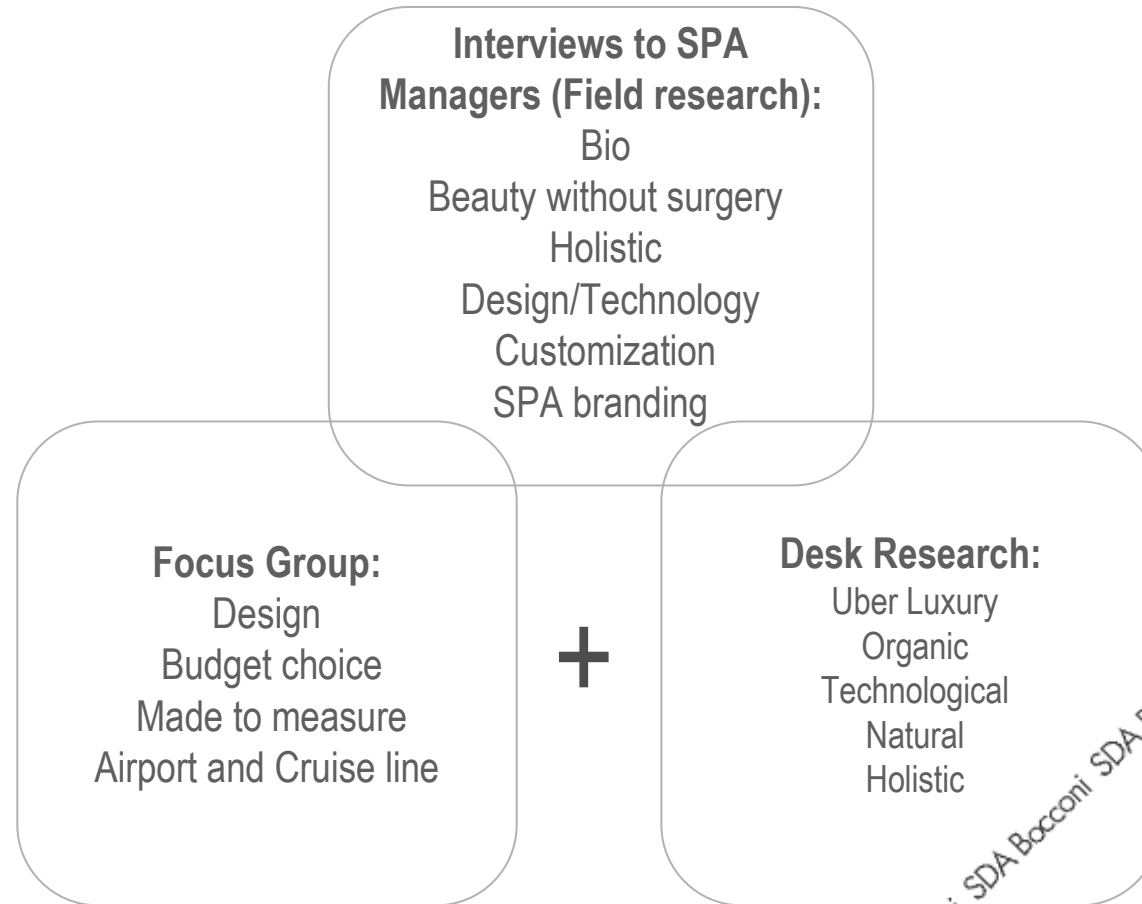


**SPAs should create unique experiences  
Great products are not enough**

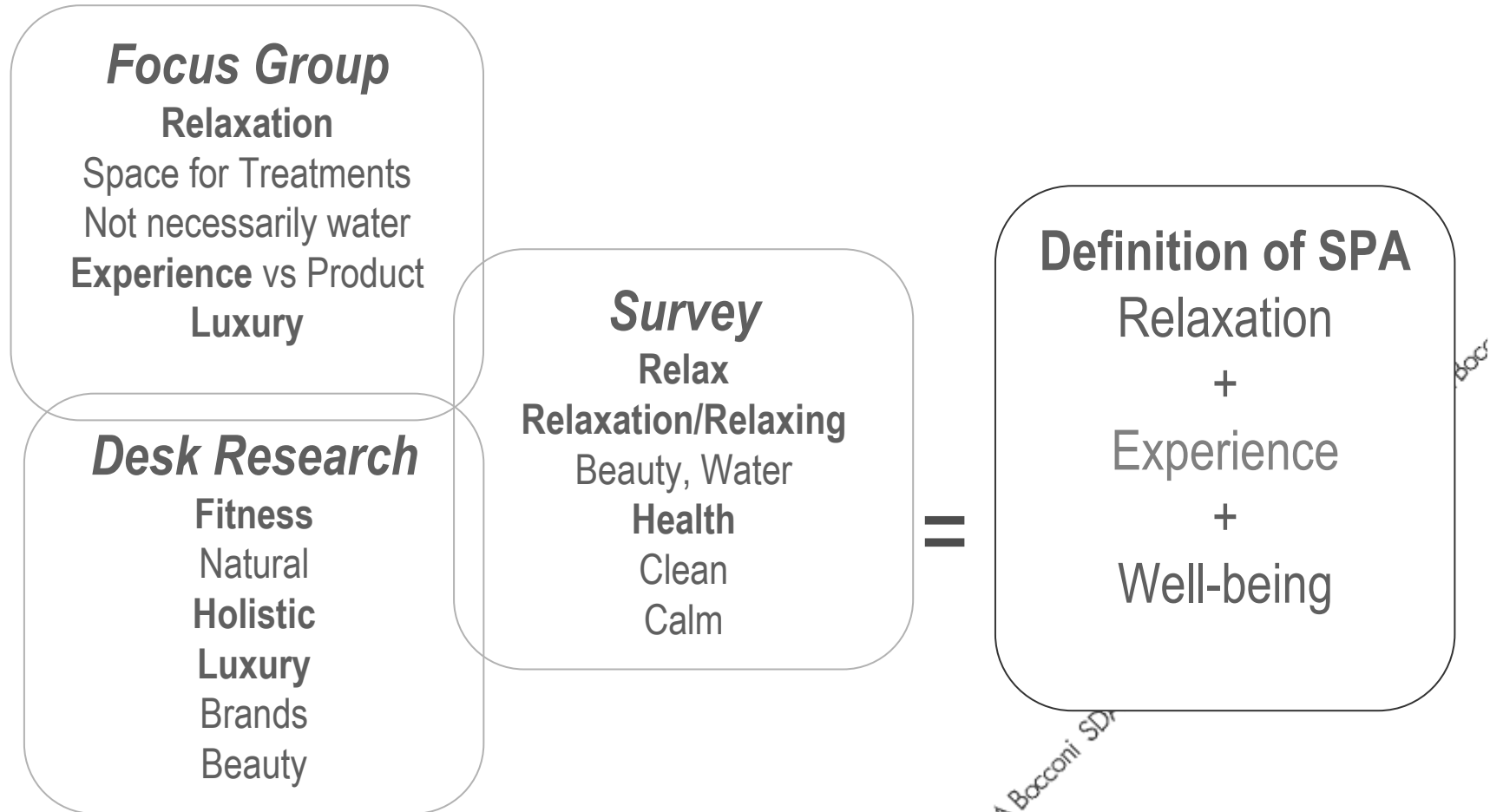




## Emerging Trends in SPA



# Emerging Definition of SPA



What is the SPA experience?

## Experience. Definition

The history of the word **experience** aligns it closely with the concept of **experiment**.

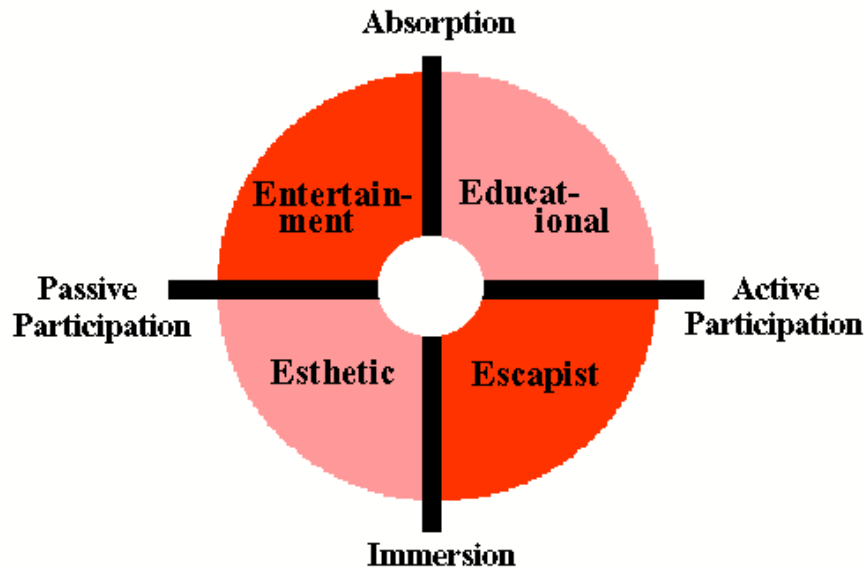
The concept of experience generally refers to  
**know-how or procedural knowledge, rather than propositional knowledge.**

“...knowledge of or skill in or observation of some thing or some event gained through  
**involvement in or exposure** to that thing or event”

The accumulation of knowledge or skill that results from direct participation in events or activities

**Experience**  
**=**  
**Coherent Set of Stimuli + Senses**

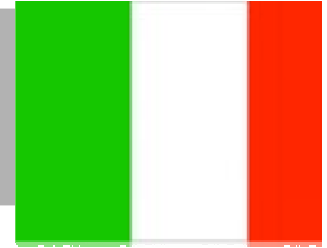
## Experience. Definition *From "The Experience Economy, Pine & Gilmore, 2001)*



### Four kind of experiences

- Entertainment
- Educational
- Esthetic
- Escapist

The experience of SPA can give SPA guests opportunities to just relax (esthetic and entertainment) but also accumulate knowledge about treatments (educational) and escape (escapist). Different experiences should be delivered through different strategies



*The Italian advantage. Providing an **holistic** experience delivering the four experiences*

- **Entertainment:** enjoy the location, the Italian Landscape
- **Educational:** learn about innovative ingredients and *genius loci*: Vino Therapy-Tavaletto, Thermal SPA, Ribes Negrum (i.e. Vita Nova Association- Trentino)
- **Esthetic:** design and fashion brands designing spaces
- **Escapist:** rituals providing relaxations





## What we saw

Luxury SPA

Relationship between design and wellness  
(space)

→ Profitable SPA design

Olfactory impact in the wellness world

New in 2008: Vino Therapy

Degustation

Wine fragrance

Anti age products/creams

Toning and firming products for SPA

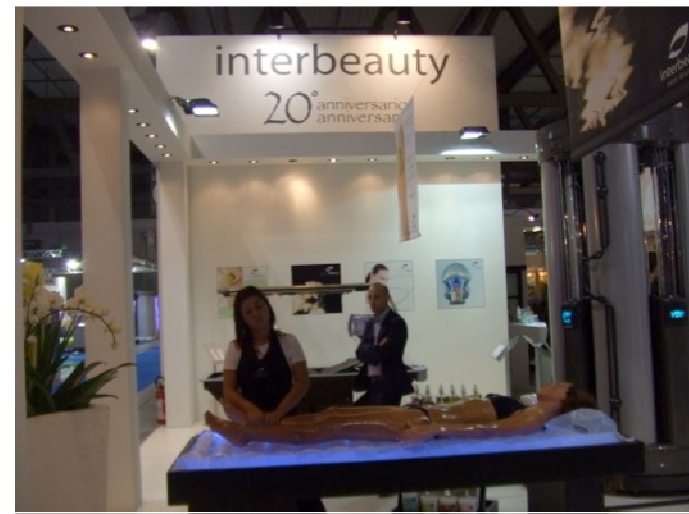
SPA Staff

→ Selection has an important impact on  
transmission of experience

Communication

→ Reconsider importance of marketing of  
SPA

## SPA & Wellness Fair



## What we learned

French Brands:

Thalgo, Sothys and Phytomer

Very present at the fair and one could see the amount of **capital** invested in this type of event. Used space was very visible and position inside the fair was key.

→ French brands are very aggressively entering/capturing the Italian market.



## SPA & Wellness Fair



**SPA Level:**

**Location:** City and Zipcode

**Type:** Day or Hotel SPA

**Ambience:** Decor, Colors, Music, Staff

**Services:** Treatments (body, face, hands/feet etc)

**Uniqueness:** Concept or differentiating factor

**Product Level:**

**Brand Name:** Product Brand used

**Special Ingredients:** Differentiating ingredients in products

**Function:** Effect on body and mind by usage of product

**Distribution:** Locations and formats

**Base:** Natural vs Technology

**Best Seller:** Best Performing Product

## Unipro Project -- Interview Questionnaire

Interview Date

Interview Time:

Interviewee Name: Contact not available

Phone:

E-mail:

Interviewed by:

**A) Identity Card of Spa (to be completed by Melanie and Puja and confirm at spa)**

- Name:
- Location:
- Year of Foundation:
- Surface:
- Main Treatments:
- Turnover:
- Number of Employees:
- Cluster it belongs to:
- If Hotel, number of stars:

**B) Spa definition/history and mission**

1. Definition of SPA? And differences of definition in comparison with other countries?
2. What are types of SPA in your opinion in France? And differences of types in comparison with other countries?
3. Tell us about SPA (or hotel) industry in France and how you think it has evolved over the past 5 years? What are the strengths and weaknesses, opportunities?
4. Tell us about the history of your SPA (when was it opened, why) and how it has evolved over the years? What are the strengths and weaknesses, opportunities?
5. What is the economical impact of the SPA to your overall business (if in a hotel)? Advantages/disadvantages and opportunities?

**C) Services offered**

1. What are the treatments you offer and what is your SPA famous/known for? What are in your opinion the must have treatments for any SPA?
2. What kinds of products are used at your SPA? Why? How often do you change the product offerings?

**Standard**

- Shiatsu Massage
- Thai Massage
- Swedish Massage
- Body
- Hot Stone Massage
- Other

**• Non Standard****D) Target**

1. Who is your target customer? What types of clients do you have at your SPA? (*nationality, age, sex, socio-economic, lifestyle, characteristics of needs, for ex: many services in limited time, tourists vs. non tourists, hotel guests vs. non guests*)

- Percentage of customers
- Tourist vs Local
- Men vs Women
- Young vs Old (similar to age ranges in survey)
- Income Levels (similar to survey income levels)
- Groups vs Individuals
- Families vs Single people

2. What are the nationalities of your most frequent customers?
3. How do they book appointments at your SPA? Or do they just walk in?
4. How long do they use the SPA for?
5. How often do they visit the SPA?
6. What are the main differences you encounter between clients today and the clients of five years ago? Who do you see as your future client?
7. What are the main reasons clients visit your SPA? (*status symbol experience, quality of personnel, innovation, unique treatments etc*)
8. What are the most requested services? What are the new requests from clients? How often do you change the treatments offered?
9. What are the most popular treatments for different nationalities of clients visiting your SPA?
10. What are the factors that a client considers important when evaluating service? (*personnel, environment, cleanliness, innovation*)

**E) Marketing and CRM**

1. Do the clients prefer a standardized package or to create their own package made to measure? How or to what extent are traditional treatments changing towards new preferences of consumers? ( ex traditional: mud, massages etc)
2. What price are clients willing to pay for SPA treatments?
3. How important is experience at your SPA?
4. How important is service for your client? Do you think operators are able to meet the service demand?
5. What is the percentage of "loyal" clients do you have at your SPA? Do you work on making clients loyal (if yes, how? And if no, why not?) Do you maintain information on your SPA clients?
6. What marketing/communication do you use to promote your SPA or to make clients loyal to your SPA? Any special packages or innovative marketing?
7. How important is your website and other online networks in your SPA business?
8. How do other services you offer at your establishment impact your SPA business? Do you cross promote activities at your establishment with the SPA?
9. Who do you consider as competitors and why? How do you distinguish yourself from the competitors through marketing (if at all)?

**F) Organization and Personnel**

1. What is the level of R&D you put into your SPA (services & products)?
2. How does the organization of your SPA work? (how many management roles, technical staff, specialists, how much experience on average for each category?)
3. What kind of training is provided for your SPA Staff and what are the criteria for hiring staff at the SPA?
4. Are there certain staff members that are more requested for SPA treatments than others? Why?
5. What do you consider to be the best training for your team? What are the top schools recommended by you? What schools do your best staff members come from?
6. What are the greatest challenges you face at your SPA?

**G) Trends / Opportunities**

1. What are the trends in products offered at SPAs? Which do you see as the greatest threat and opportunity in SPA products for France and global?
2. What are the trends in terms of average prices at SPAs?
3. What is the perception of Italian SPAs?
4. What are the present SPA trends? What do you see as the major trends in SPA and beauty in the next 5 to 10 years? (France and global)
5. What is the future of SPAs/beauty and opportunities for innovation?
6. What do you consider the current key success factors for SPAs? What do you consider to be the future key success factors for SPAs?
7. Which countries in the world do you see as the ones with most opportunities and most threats to your SPA business?
8. As an operator, what are the key factors to succeed in the SPA business and what needs to be changed overall?
9. What are your opinions on, designer brand SPAs and other emerging SPA segments?
10. Any interesting SPA story of clients you would like to share with us?
11. What is your favorite SPA aside from the one you work at?
12. Any other thoughts?



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