



SpaFinder 2010

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SPA TREND REPORT

Top 10 Global Spa Trends to Watch



SpaFinder, the global spa resource, has announced “Top 10 Spa Trends To Watch In 2010,” the company’s seventh annual forecast of the emerging concepts that will shape the world of spa in 2010 and beyond.

Top Ten Global Spa Trends to Watch in 2010:

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1

THE NEW “P” WORD

Goodbye, pampering. Hello, prevention. Well, not so fast. It's more like, move over, pampering; hello, prevention. Against the backdrop of a global healthcare crisis, prevention is poised to be the new “it” word of the spa industry in 2010 and beyond. But rather than replacing established industry concepts like pampering and wellness, it's a sharp (and smart) refocusing of the conversation. Pampering, after all, speaks to the goal of most spa-goers of stress reduction and relaxation, and that in itself is preventive.

Prevention has moved front and center on the world health stage, and the spa industry's role in prevention-focused health regimes will be greatly emphasized and more forcefully promoted in 2010. For years, of course, spas have been “doing” prevention; i.e., focusing on exercise, nutrition, stress reduction and Eastern stay-well medical paradigms like Traditional Chinese Medicine or Ayurveda, years before new, cutting-edge hospitals unleashed “integrative health centers,” interweaving traditional medicine with many of these established spa approaches.

A global spotlight exposing how expensive, inefficient, and unsustainable the “wait-to-get-sick” healthcare model really is—new evidence that stress contributes directly to 80 percent of all disease—along with mounting evidence that the cornerstones of the modern spa industry are medically proven to forestall illness and promote longevity, are driving this trend. (And within the spa industry, the old, oft-maligned “P” word, pampering, will actually play a key role in the prevention focus, as basic relaxation and de-stressing are now known to have such a powerful impact on people's health.)

Watch for the words prevent and prevention to be used more frequently. Examples already include Germany's Brenner's Park-Hotel Medical Spa's PREVENT program, combining comprehensive examinations with personalized therapies, nutrition, and fitness, and the Pritikin Longevity Center and Spa (recently relocated to Miami, Florida), which for the first time will be covered by Medicare in 2010.

The analogous trend on the beauty front is the ever more intense focus on anti-aging: a continued explosion of treatments, diets, and products (of course, sunscreen) that get aggressive early to prevent problems and avoid costly, invasive actions after the fact.

2

YEAR OF THE HAMMAM

With spa-goers increasingly seeking authenticity, tradition, and that magical spa experience that also offers true results, the Eastern European/Middle Eastern/North African hammam (hamam in Turkey) represents one of the hottest trends for 2010, albeit with a distinctly modern expression. This is the year in which people who've never heard the term hammam will learn its meaning, and those already familiar with it will discover new places to experience it.

Anyone who has sampled this age-old ritual of cleansing and purification will not be surprised by its rising popularity. The combination of a vigorous full-body scrub and bubbly soaping, now often capped by a full-body massage, makes for an extraordinary experience, with results that last weeks. A traditional hammam, from an Arabic word meaning "heat," consists of a hot room (the sıcaklık, or hararet), a warm, intermediate room, and the cool room (or soğukluk). And these are not ordinary rooms but typically architectural marvels.

Spa-goers love hammams because one can extend this Eastern European/Middle Eastern/North African multicircuit bathing experience for hours. Spa owners love them because of their photogenic "wow" design and the opportunity to make money, since the treatment requires a therapist and allows for top dollar/Euro pricing. And although traditionally they've been a same-sex experience, new modern twists have broadened the experience to couples.

Travel to venerable hammams like the 16th-century Çemberlita in Istanbul will increase, while brand-new spas will unveil distinctly modern incarnations. Introduced to the modern spa scene by lavish Middle

Eastern resort spas (such as Dubai's One and Only Royal Mirage or Morocco's La Mamounia), next-generation versions are already gaining popularity in Europe, where top spa builders and product manufacturers report a serious increase in requests for a hammam component in new spa design. The trend is hitting North America: Ten Spa in Winnipeg, Canada opened a few years ago with a hamam and offers a variety of experiences including their "Hamam Fully Loaded" treatment. This year both the Drift Spa at Palms Place and Mandarin Oriental in Las Vegas recently rolled out hammams, as did the new InterContinental Montelucia in Arizona. Trump Soho in Manhattan (slated for early 2010) will boast separate luxury hammams for men and women. And expect Turkish hammams in both the Traymore and Epic Hotels in Miami. You can also expect more floating versions on cruise ships soon.

And delegates attending the 2010 Global Spa Summit (fittingly taking place in Istanbul next May) will sample both ancient and modern local interpretations. In the future, look for sauna or steam rooms around the world inappropriately labeled "hammams" to be taken to task as the industry commits to higher standards of authenticity.

3

NOT “GOING TO” BUT “BELONGING TO” A SPA

No longer a place where you infrequently “go” for the occasional treatment, spas are being creatively reimagined as places of “belonging”—not only literally, through the rise in membership programs, but also in the diverse ways spas are being recast as social or communal hubs—contributing the additional, although unspoken, benefit of emotional health.

Five years ago, it would be difficult to imagine the spa as your “hangout,” where everyone knows your name, but new industry approaches are making “spa belonging” a reality, and in 2010 consumers will further bond with their less forbidding spas, as they increasingly hit the spa to connect with others.

According to a recent SpaFinder global survey, only a small percentage of spas have some kind of membership program today, but 23 percent report they’re actively considering implementing one. The membership model is an extremely savvy strategy for tough times (and beyond), keeping valued clients close; filling therapist time; helping “stay” spas attract local, day customers; and increasing revenue from membership fees/dues. (Note: Spa clients spend on average 18 percent more after they become members.) And consumers love the (often significantly) reduced treatment rates, the incremental, personal discounts, and rewards/loyalty programs.

Every species of spa is rolling out memberships: popular day spa chains like California’s Burke-Williams and Total Woman, urban hotel spas like the Peninsula NYC and the Intercontinental in San Francisco, destination spas like the Oaks at Ojai in California, even spa residences like Canyon Ranch Living and mobile spas like the UK’s TherapyClub.com.

But “belonging” transcends mere membership, as spas are transforming themselves into places of community, education, and social mingling with events like free meditation sessions at lunch, wellness speakers/classes in the evening, parties, fundraisers, local philanthropic events, spa hiking/walking groups, and book clubs. The industry is getting innovative with this “Social Spa-ing 2.0”: Consider the wine lounge at the new Caudalie Spa at New York’s Plaza Hotel, where bathrobe-clad spa-goers enjoy wine tasting while chatting with the sommelier (and each other) posttreatment.

Look for significantly more programs at spas next year that bond consumers to spas and people to each other. After all, winning designs submitted by grad students at the 2009 Global Spa Summit Student Strategy Challenge revealed that the next generation of spa designers find the current spa environment, in a word, boring and imagine the “spa of the future” as a multiuse communal space revolving around a lounge/bar/“hangout” area, even incorporating online social media connections.

4

THE ONLINE SPA

2010 will prove a watershed year for the spa industry's virtual presence. Consumers are already finding spas online, booking treatments, joining online weight loss and coaching groups. They are printing out instant gift certificates, shopping virtual spa stores, being influenced by online reviews, and embracing social networking sites, such as Facebook and Twitter. (Some even play the Sally Spa game (<http://sallyspa-game.com/>). But there's more to come.

Get ready for gaming while you exercise, for having health information (like your blood pressure and heart rate) automatically uploaded for access online by your spa or doctor, and for spas to use yield management software that (much like the airlines) enables price variation, so spas can offer a less expensive massage on weekday mornings, compared to Saturday afternoons. And in early 2010, you'll be able to stroll down any street in the U.S. and check your iPhone to pinpoint the spa nearest you, thanks to the upcoming SpaFinder App.

Sure, the Internet's been around roughly 15 years, but there's always that breakthrough year when online really clicks for each industry, and 2010 looks to be the defining one for spa adoption of Internet and social media marketing, along with new cutting-edge spa apps. It's all being driven by global consumer behavior—the Web is simply where they “live” now. And these consumers expect instant information on spa services and offers, and even instant gratification with 24/7 reservations.

A recent SpaFinder survey reveals that 76 percent of spas are already selling gift certificates online, and an additional 8 percent have plans to. Thirty-three percent

have embraced online, real-time appointment booking, and 21 percent plan to. Thirty-two percent currently sell online retail products, and 27 percent plan to. And spas are jumping into new social media platforms to connect with clients, albeit with a significant preference for Facebook over Twitter: Fifty-five percent of spas are now using Facebook (another 17 percent plan to), while 32 percent are using Twitter to get their deals out, and 19 percent plan to. (A more modest 29 percent currently use/plan to use mobile marketing.)

And with the explosion of online review and booking sites (i.e., Citysearch and Yelp in the U.S., Booking.com in Europe, SpaFinder.com globally), consumers are increasingly selecting spas based on what real-world consumers say online. Thankfully, spas are beginning to pay attention to their online reputations: Sixty-one percent now encourage their clients to write online reviews, and another 14 percent plan to.

In general, the way spas virtually connect with consumers is getting far, far more creative. But, while it seems you can almost “spa online” these days, there's still nothing that can (or will) replace human touch. Spa, in fact, may be the ultimate countertrend to the world's online virtual mania.

5

THE HYBRID SPA

The modern spa is increasingly a “hyphenated” affair, with spas incorporating far more fitness, fitness centers incorporating more spa, hospitals incorporating spa elements, and spas bringing in more medical doctors and specialists. The era of the spa/fitness/integrated-health-center/hospital/spiritual-retreat/wellness-center/beauty-clinic is on a serious upswing. It’s one integrated human body, after all, and the “pure” spa is on the decline, while the hybrid spa is busy inventing new you-name-it, plugged-in models.

According to a recent industry survey, 64 percent of spas today still identify themselves as a “pure spa,” but 38 percent of those plan to add hybrid (fitness, complementary medicine, etc.) elements in the future. So with only 26 percent of spas vowing to remain “pure,” the profusion of hybrid models on today’s spa showroom isn’t surprising. Twenty percent of spas now offer exercise/fitness, 29 percent offer wellness/complementary medicine (acupuncture, etc.), 35 percent feature spirituality/mind offerings (meditation, etc.), while 25 percent offer classes on wellness topics, etc. For consumers, it means your exercise and overall health and wellness regime—and your spa—are naturally merging.

Consider the hyphens: “club spas” combining fitness and spa, chiropractic and spa, “Biggest Loser”-style boot camps and spa, mobile spas within hotel spas, every breed of medical and spa, “beauty bars” combining manicures and martinis, hospitals morphing into “integrative health centers” or “spa-spitals,” spa and fertility, spa and meditation, spas providing cancer care—even spas integrating fitness programs that are themselves fusion-hybrid models: spinning yoga, pilates, ballet, kettle balls, weights, hula hoops—you name it—into new amalgams. Fueling the trend:

Investors are more keen on spending on the broader health and wellness category today than on pure spa.

Examples include: Nuffield Health (200 U.K. facilities), combining the hospital/clinic/diagnostic center with the health club and full spa services, interweaving yoga, physiotherapy, etc.; the Malo Clinic Spa at the Venetian Macau-Resort Hotel in China, an integrative wellness center offering both comprehensive medical treatments and executive health checkups (six operating theaters, a staff of 50 doctors, etc.) with a full spa featuring 100 spa therapists; Exhale MindBodySpa (15 day spa locations from Los Angeles to the Caribbean), integrating yoga and fitness classes, acupuncture, nutrition, workshops, fertility programs, etc., around the core spa model; and Joan Lunden’s Camp Reveille, combining a traditional women’s “summer camp” with spa, set to travel to destination/resort spas across the U.S. next year. Still to come? Word has it that trendy global clothing giant Urban Outfitters will be rolling out a hybrid of its own.

6

THE PRICE IS (STILL) RIGHT

2009's headline spa story was the industry's aggressive response to the global recession and the near-universal focus on deals, deals, and more deals. While there's (cautious) consensus that the economy is in recovery mode, there's great news for consumers in 2010: The spa bargains will continue apace, not only straight discounting, but also more innovative incentives smartly designed by spas to drive incremental revenue and retain loyal customers. And keep an eye out for savvy new spas combining less expensive treatments and facilities with a touch of glamour, hitting that sweet spot between "nice" and "price."

While economists predict there will be a modest economic recovery next year, don't fret, spa-goers. You're still going to see very attractive spa pricing and specials. In fact, a new industry survey shows that, rather than a discounting backlash, spas are planning either to maintain 2009 deal levels, and even increase them, across the whole spectrum of spa incentive categories. One reason is the continued increase in supply. After all, there were spas in various stages of construction at the start of the recession, and while some scrapped or delayed plans, many saw it through, and we've continued to see a significant growth in new spas across these two difficult years.

When it comes to "pure" discounts (straight percentage/dollars off), 51 percent of spas plan the same level as 2009, and 35 percent actually expect to somewhat or significantly boost them (only 14 percent plan less). But watch for more imaginative, personal, retention-focused offers on the (massage) table in the new year: Sixty-six percent of spas plan to increase their "value-add" offers (extras thrown in to keep prices the same), while another 31 percent will stand firm on these value-add offers. Sixty-three percent plan to

increase their "creative" discounts (like memberships, two-for-ones, sampling programs), while another 29 percent will stand firm there. And 41 percent plan to increase "overall value pricing" (not deal-focused, but setting the right, upfront price). Basically, fewer than 1 in 10 spas report they expect to decrease discounting in the year ahead.

Consumers will see more unique offers like loyalty points/rebates toward future services, generous rewards for referring friends, VIP pricing for regular clients, and even open house events where consumers sample new treatments for a nominal fee or free. These deals will keep brands and the spa/wellness value perception front and center.

So get ready for more deal days ahead, and in March, SpaFinder will roll out its own "Deal Days," when \$50 treatment prices hit a spa near you!

7

WELLNESS TOURISM

We're familiar with people seeking spas for wellness—and also with “medical tourism,” crossing borders for medical procedures (often plastic surgery, dentistry, knee replacements, etc.). Well, make room for “wellness tourism,” a term now being used to describe traveling across borders for preventive services, diagnostics, spa and well-being vacations, even the wow's of DNA testing, stem-cell banking, and the like. The concept not only dramatically broadens the appeal of the medical tourism model (which has suffered from its narrow association with plastic surgery), it's increasingly poised to become the way we define our time away from home and work in the future.

“Wellness tourism” is part of an evolving terminology that's not merely verbal industry nitpicking, as governments, insurance companies, medical establishments, as well as consumers, wrangle with the skyrocketing costs of healthcare and the need for people to take greater responsibility for their own health. The focus of “wellness tourism” is squarely on prevention and helping people make lifestyle changes. The opportunities are immense, as governments all over the world begin to look at this arena as a way to attract tourism dollars as well as lower health care costs. After all, this trend is at the intersection of two of the largest industries in the world: tourism and health care. Now that's a wow!

Examples include stem-cell banking at a facility like Medical City Hospital I in the Philippines, to executive physicals at a Lanserhof in Austria or at Kurotel in Brazil. Traveling across borders to destination spas such as Champney's in the UK, Rancho La Puerta in Mexico or Chiva-Som in Thailand for a life/health turnaround (and being immersed in exercise, nutrition,

stress-reduction therapies, etc.) are, of course, examples of core, established “wellness tourism.”

Many global consumers opt for these journeys because another country/region offers significantly lower costs or greater procedure/treatment availability. But the upswing is also part of a wider trend toward “mindful,” not “mindless,” travel. Given the economic and moral climate, people are increasingly embracing travel with a higher benefit to either themselves (and their bodies) or others, whether that's wellness tourism or “voluntourism” (travel with a philanthropic component), environmentally aware (eco) travel, or educationally or culturally immersive travel.

8

SCARY AND SILLY SPA STORIES DRIVE EVIDENCE, SCIENCE, AND STANDARDS

The fallout from heavily publicized spa horror stories—and the recession-driven consumer insistence on no-gimmick treatments with real, measurable benefits—will quicken a rising industry trend: the demand for evidence-based therapies, stricter industry standards, and greater transparency/resources to help spa-goers separate the spa wheat from the chaff. As spas move into the health and wellness sectors, facts, evidence, and science that support industry approaches will move front and center, even at the cost of a few diamond facials.

A horrific sweat lodge tragedy (even if it was incorrectly yoked to the spa industry), as well as some truly scary stories of med-spa procedures gone terribly wrong, got our attention in '09. As did the silly spa stories, whether nibbling fish pedicures or slithering snake massages. Yes, media representations of the spa world can sometimes be flat-out wrong or cartoonish, but the impact can, with wise response, ultimately prove positive: It's leading to more activity to ensure safety and standards and provide clear evidence that spa approaches actually work—the most powerful weapon for an industry increasingly staking out its health and wellness authority and the bedrock upon which future growth is based.

In a new industry survey, 84 percent of spas report that their clients are notably more interested in “results-based treatments” and “seeking tangible, proven benefits” than just a couple years ago. Luckily, there's a fast-growing body of medical evidence about the proven benefits of massage, stress reduction, healthy sleep, weight loss, acupuncture, the efficacy of certain beauty treatments that will now be more firmly yoked to industry offerings. Evidence-based industry reports, for example, are currently being aggregated with the guidance of such experts as Dr. Brent A. Bauer

from the Mayo Clinic and Dr. Ken Pelletier from the University of California, San Francisco. Also helping to raise the standards/evidence bar around the world: Dr. Richard Carmona (former surgeon general of the U.S. and current vice chairman of Canyon Ranch), Dr. Andrew Weil through his work at Miraval, and Dr. Samuel Bernal, expert advocate of the hospital-spa combination, who practices on three continents.

Consumers will perform more spa and doctor background checks online and off, and spa and medical accreditation will matter more and become more transparent. Programs like ISPA's Code of Ethics and the stringent standards required for Leading Spas of the World qualification already help, but there will be more consumer pressure for additional programs like those offered by Spa Quality and Coyle Hospitality Group, which undertake spa audits and “mystery shopping,” always best performed by former/current spa operators, doctors, or therapists.

9

DIVERSITY AT A TIPPING POINT

For years analysts have discussed how the spa industry has been attracting new demographics (men, teens, seniors, new ethnic groups). But in 2010 diversity has reached a tipping point in the U.S that in time will likely be followed by the rest of the world: It has fully arrived, and it's here to stay. Spa-going has become so mainstream that the face of the spa-goer will now continue to reflect the wider global population. Every spa region has its unique "diversity story", and around the globe both women and men, younger and older generations, and all ethnic groups are hitting the spa. And spas are taking note, with offerings that cater to these diverse groups' needs and wants. Set to explode: In the U.S. alone, where approximately 78 million baby boomers are poised to enter their 60s, watch for "silver spa-ing" to really take off.

The "diversity story" for the global spa industry takes diverse angles, from who's going to the spa, to what's on the spa menu (the exportation of approaches across the world), to the rise of spas specifically targeting regionally specific demographics. Our world is simply more "global" than at any point in history, from Asian immigration to Australia, to the influx of African, Indian, Asian immigration across the European Union, to strikingly diverse markets like the U.S., where vibrant African-American, Hispanic, and Asian populations mean that roughly 1 in 3 people in 2010 will be classified as "nonwhite"—a force, in part, responsible for putting fresh new faces not only in the White House, but also in the spa. A recent industry survey of U.S. spas, for example, reveals significant gains in spa-going among African-Americans, Hispanics, and Asian-Americans, but with even more profound gains by men and teens.

The explosive rise of men at spas is nearly pan-global. From resort spas taking that man-friendly "lodge" approach (where the aura is backcountry and adventure), to the explosion of men hitting spas for weight loss or cosmetic treatments like Botox, to the huge growth in expensive man-targeted spa/beauty products, to men-only day franchises like Nickel Spa (Paris to San Francisco) offering that "haute barber shop" vibe and a menu including sports massages, "hangover" skin cures, and clubby happy hours.

Spas report new, diverse clientele; for instance, Thailand's Chiva-Som (traditionally attracting Westerners) is seeing far more Chinese/Asian guests. Some spas cater to a distinct group; as an example, Soul Day Spa & Salon (Washington, D.C.) has its sights set on expanding its unique African-American skin/hair spas across the U.S. And the spa

industry's own marketing/presented image reflects these new faces; a case in point: African-American celebrity Vanessa Williams graces the cover of SpaFinder's 2010 Worldwide Directory. Another diversity trend looming: "silver spa-ing." As hundreds of millions of increasingly health conscious people hit their sixties in the next decade, the global population is set to age differently from any "old people" in history. This next generation of seniors does not respond well to stereotypical terminology or approaches for the "elderly." So today, while 20 percent of "stay" spas have ideal fitness programs for "seniors," only a small percentage (less than 5 percent) dub that program "for seniors." More spas will undoubtedly begin to offer new programs, but the challenge will be to cater effectively not only to the spending power, but to the special psyches, of this burgeoning 60-plus generation.

Another profound facet of this "globalization" is that, while the term typically conjures the McDonalds-ization of the world (the spread of corporate sameness), the spa industry provides an extraordinary, shining example of globalization essentially in reverse: the massive exportation (and promotion) of indigenous therapies and health traditions across the world, from yoga, Traditional Chinese Medicine, Ayurveda, Thai or shiatsu massage, reiki, etc. Each year, there's new experimentation with another centuries-old, indigenous treatment, this year showcasing the Arabic hammam.

10

STILLNESS

The modern human experience is an unprecedented amount of sensory overload, noise, and media stimulation. We're wired to the gills, spending nearly all waking hours in front of TV and computer screens—bombarded, texting, Tweeting, clattering away—now even on airplanes. With the spa as one of the last remaining sanctuaries of silence and serenity, look for the industry to put a new emphasis on stillness, on slowness, on silence.

While traditionally spa treatments are experienced with “spa music” in the background, tastes are changing, as evidenced by the variety of channels offered and the attention to levels of sound. Some therapists are even reporting that their clients are asking for no music at all—just quiet. Amy McDonald, a seasoned and always thoughtful spa and wellness consultant, took the novel approach of customizing music channels for Foothills Health Consultants in Calgary, Canada, by adding a “white noise,” “filler sound” option. Reports are it has become their most popular channel.

At other spas, most notably those that offer outdoor massages by the ocean, have found that the rhythmic sound of the waves is more relaxing than any artificially introduced music. At Red Mountain Resort & Spa in Utah, you can opt to take the “silent hike,” and at Rancho La Puerta in Mexico, you are encouraged to try a “silent dinner.” The environmentally conscious Six Senses Spas around the world have recently introduced a “Slow Life” approach. There is an upswing in meditation offerings and programs, especially in urban settings. Spas are helping clients move from busy-ness and overload to quiet, to stillness. As Amy McDonald explained, she likes to create spas where “guests get to hear the sunrise.”

BONUS TREND: CELEBRATING CELEBRATION

In a recent survey, travel agents reported the #1 emerging spa travel trend was people increasingly hitting stay spas for special occasions like the big 'Os', anniversaries, weddings, retirement parties, etc. And after the severe downturn in hotels' corporate/meetings business (which, because of virtual conferencing, will continue to decline), the industry is aggressively incentivizing group celebration travel to revitalize lost business. This concept was born at the day spa (with its long tradition of bachelorette, graduation, and "girlfriend" parties), and its rapid migration into the travel arena in 2010 is one great reason for the industry to celebrate.

It makes sense. Spa-going is increasingly associated less with luxury and pampering and more with celebrating and affirming one's life and well-being. On the rise: people taking over entire spa properties for weddings, birthdays, all kinds of personal celebrations, whether at Chewton Glen in the UK or Borgo La Bagnaia in Italy. More families (often multigenerational) are getting away together to celebrate and create memories—and do a little "relationship wellness."

And note: Some argued the staycation was just a fad (because the word seems faddish); however, attractive local spa packages have proved them wrong, and the staycation is not only here to stay, it's on the rise. With less hassle and expense, people are embracing the idea of vacationing nearer home and checking into a local/nearby resort to rejuvenate on the quick. And for that breed of staycations (where decompressing is key), spa-going will always be a main attraction.

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