



SpaFinder 2011

SPA TREND REPORT

Top 10 Global Spa Trends to Watch



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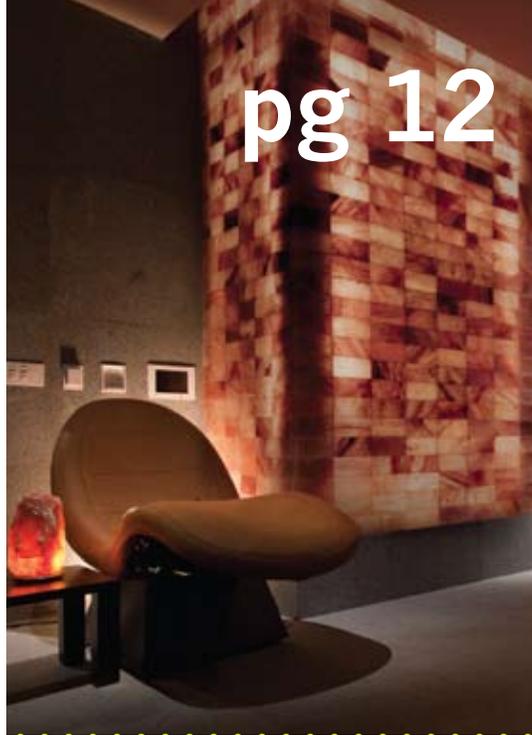
In 2011 President Susie Ellis predicts all eyes will be on Asia, an explosion of spa brands, a new focus on aging demographics, a liberal dose of salt, and more will hit the spa scene.

This is the company's eighth annual forecast of the emerging concepts set to shape the world of spa next year, and beyond.

SpaFinder, Inc., the global spa and wellness resource, has released its eighth annual spa trend forecast, SpaFinder's Spa Trend Report. The report is based on analyses from a large team of experts who visit hundreds of day and stay spas each year; interviews with top industry analysts; ongoing research across the spa, travel and beauty sectors; and data derived from the company's relationships with over 9,000 spas and salons across the world.

The Spa Trend Report is developed under the direction of SpaFinder President Susie Ellis, credited for being the first to forecast numerous industry "mega-trends" that have taken hold at spas around the world.

"As someone who has watched the modern spa industry from its infancy, I have never seen the aggregate level of creativity and talent in the field — as wellness, fitness, beauty, design and cuisine are blended in unique new ways, just as the economy begins its upswing," Ellis says.



Top Ten 2011 Global Spa Trends:

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**65+ POPULATION
ON THE RISE**

1

AGING... RAGING

Think: Pain Relief Massage

Whatever terms you use, “aging baby boomers,” “silver spa-ers” or “active retirees,” the fact is that the 65-plus spa-going demographic will have a massive impact on the industry for years to come. The data on the “graying” of the North American, European and Japanese populations could fill a library, with these regions’ populations aging at a rate unprecedented in human history. Millions of baby boomers (the generation that galvanized the spa/wellness revolution) are now set to turn 65, with 2011 the first year the oldest boomers cross this threshold. According to the United Nations, the number of people 65+ will double worldwide by 2050, from 523 million in 2010 to 1.5 billion in 40 years.

This demographic viciously rejects labels, and the days of “over-65” as a catchall “old-person” category will soon become ancient history. (After all, there’s a huge difference between a 70-year-old who plays tennis three times a week and an 85-year-old seeking pain relief.) Savvy spas will now be rethinking everything to address these all-too-often-ignored niches’ specific needs: from facilities, to equipment, to programming, to marketing and staffing. Physical therapy, rehabilitation, recuperation, and just plain old pain relief will increase on spas’ menus to meet the needs of clientele with back, neck, knee and mobility issues.

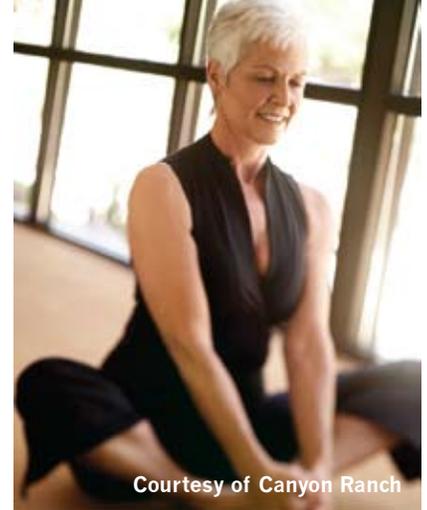
We’re likely to see a renaissance in hydrotherapy, once perceived to be no more than a relaxing pastime for grandparents, especially in Europe. As boomers discover the therapeutic benefits of exercising in water and the pain-relief benefits of thermal water soaking, they will no doubt put a new chic and hip spin on this activity. SpaFinder forecasts a renewed respect for the benefits of Sanitas Per Aqua that has recently taken a backseat to weight loss, beauty and fitness.



Courtesy of Canyon Ranch

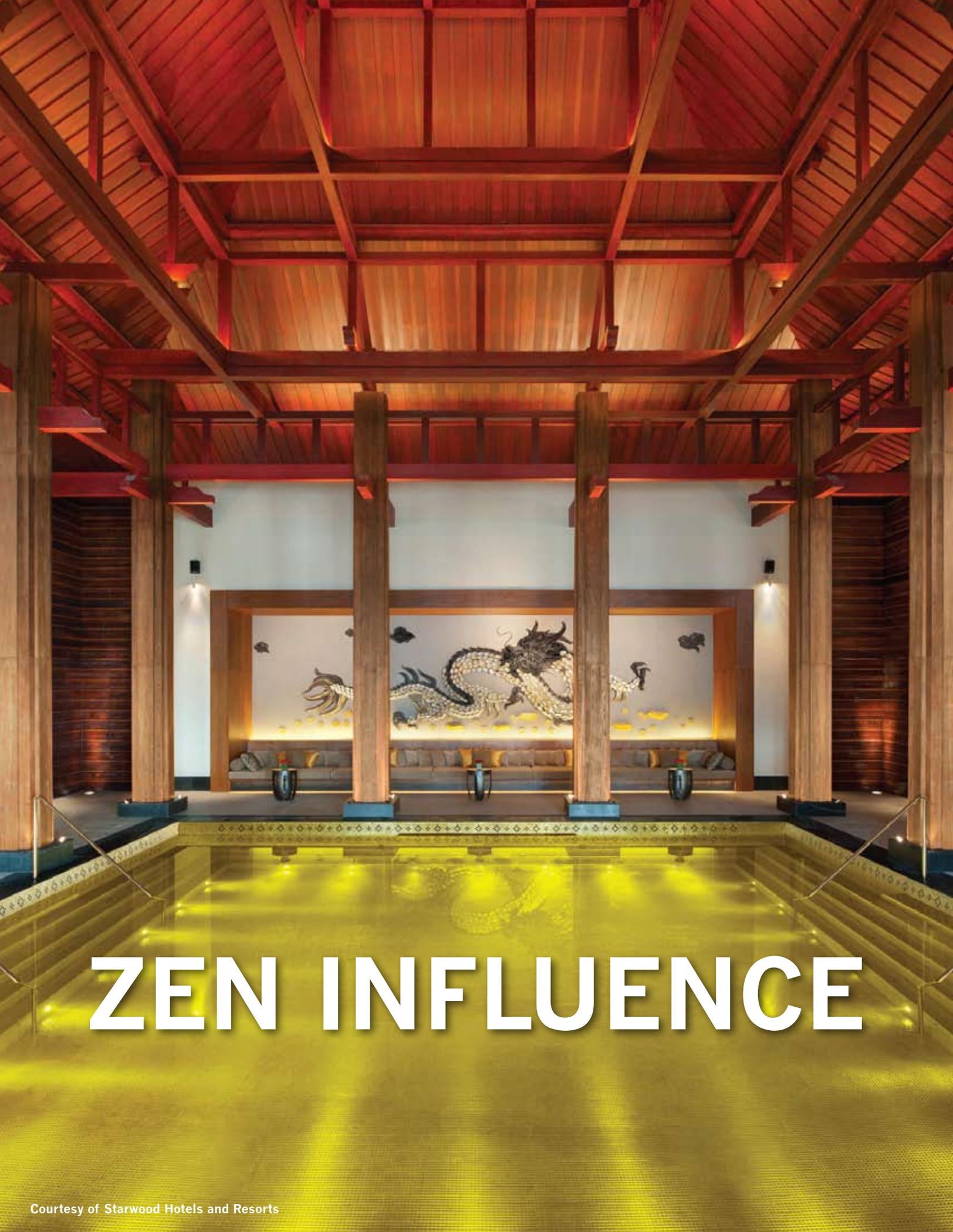
Prior research has concurred that the #1 reason people go to spas is to “**relax and de-stress,**” but in some regions of the world that may soon be replaced by to “**relieve aches and pains.**”

• The 65-plus spa-going demographic will have a massive impact on the industry for years to come...



A FEW FORWARD-THINKING EXAMPLES:

- Fairmont's Willow Stream spa brand has just launched an extensive program focused on aches and pain relief called "Stay Active Rx," with new products, services and experiences being rolled out across 2011.
- More spas (modeled after Canyon Ranch) are featuring exercise physiologists, sports medicine professionals, chiropractors, orthopedics, naturopaths and physical therapists on staff (or on call).
- Look for a rise in usage of the term "corrective" — "corrective" massage, "corrective" facials, etc., and for the already used-to-death term "anti-aging" to get a further workout.
- Infrared saunas, which function at far less searing heat (but penetrate heat further into the body than traditional saunas) will become more popular.
- New types of massage will take hold: from Biofreeze Pain Management massages, to massage focused on easing constipation, to "active release" massage targeting specific trouble areas.
- Look for new chilled loungers that accomplish what cold plunge pools do, but are more comfortable and safer for older guests.
- "Taking the waters," will take on new expressions, such as the Scandinave and Le Nordic models in Canada, the Hakone Kowakien Yunessun in Japan or the glammed-up Glen Ivy Hot Springs in Southern California.
- Many spas are even using larger print for their spa menus!

A traditional Chinese-style interior featuring a complex wooden beam ceiling with a warm, reddish-brown glow. The room is supported by several thick, vertical wooden columns. In the background, a large mural of a golden dragon is mounted on a white wall, flanked by two small black vases. Below the mural is a long, low wooden bench with cushions. In the foreground, a rectangular pool of water reflects the warm lighting and the dragon mural. The overall atmosphere is serene and elegant.

ZEN INFLUENCE

2

ALL EYES ON ASIA

An Explosion of Spas in Asia, and Asians Hitting Spas

The role Asia has played in the modern spa industry is profound: Approaches like yoga, shiatsu and Thai massage, Ayurvedic medicine, TCM and acupuncture, etc. have become the very staples of global spa menus (and people’s well-being regimes) for decades. The “Zen” nature of Asian design has influenced spas across the world. And some of the most famous hotel/resort spa brands have emerged from Asia, not only because of the continent’s diverse, established cultures of wellness/healing, but because low labor costs made for strong profits.

Historically, it’s been a tale of the mass exportation of Asian therapies/design/brands. Now an incredibly powerful new story is unfolding: The explosive growth of hotel/spa development within Asia (a market of 4.1 billion people), as well as the new spending power of Asian consumers, driving millions of new spa-goers into the spa market in Asia and around the world. The two fastest-growing world economies, China and India, will be especially influential. These markets, and others like Cambodia, Indonesia, Sri Lanka, Thailand and Vietnam, etc., are developing at a breakneck pace, unleashing extraordinary new class mobility and massive opportunities for hotel/spa development.

The Asia/Pacific region exhibited the strongest recovery from the recession, with the fall-off briefer and the rebound much faster compared with the rest of the world. For instance, occupancy in 2010 increased by double-digits in every major Asian market (except Bangkok).

There’s an avalanche of data about the runaway economic development underway in China and India: i.e., in the last 30 years, China’s gross domestic product has grown 72 times, while India’s GDP is expected to quadruple by 2020. There are 150 airports under construction in China, and 171 cities with populations of a million-plus — but most still don’t

have a major, internationally branded hotel! China is predicted to be the world's largest tourist destination by 2015, with incoming tourists skyrocketing 500% in the last decade. (India's tourists doubled in the same time.)

The hotel/spa pipeline is a crystal-clear indicator of the headline story unfolding. Asia/Pacific is second only to the U.S. for having the largest number of spas and hotels under development of any region in the world, with 77% of that regional hotel expansion in 2011 earmarked for China and India (56% and 21%, respectively). Experts compare the current hotel/



resort growth in China to the U.S. in the 50s and 60s, but predict the Chinese boom will be even bigger. For perspective, China's hotel pipeline is larger than the entire pipelines of every nation in the world put together, if one excludes the U.S. Forty-seven international hotel brands are now busily entering India, to meet demand over the next decade for 400,000 new rooms.

If incoming tourism is exploding, so is outbound and intra-Asian tourism. Predictions are that by 2020, the number of outbound Chinese travelers could double, while outbound Indian tourists will grow five-fold, establishing them as two of the six top outbound markets worldwide. By 2015, China will have 100 million outbound travelers, a number greater than the

people who visit France annually — the number-one tourist destination in the world. And, as more newly minted middle- and upper-class Asians begin to travel abroad, across the region, and in their own country, an extraordinary new tourist demographic is being born, oft-seeking the luxury lifestyle that includes spa-going the “western” way. Chiva Som, a revered Thai destination spa, recently reported 25%-plus of its guests now hail from China, while the Starwood Hotels brand reports 50% of its guests in China are now Chinese.

Prediction: Hotel/spa developers will attempt to strike a balance between incoming tourists' desires for authentic, local ambiance and indigenous, Asian treatments, and many local spa-goers' desire for super-modern, “Western-style,” luxe spa-going. Also, note: While many spa markets will be courting the aging baby boomer, emerging economies like China and India will be targeting a much younger generation. (Roughly 65% of Indians are under 35, while roughly 70% of the Chinese population is under 44.)

The year 2011 will prove a watershed year for new, breathtaking hotel/resort spas, western-style day spas, wellness/destination spas, and impressive medical tourism facilities — all rising up alongside traditional village spas from Bali to Vietnam. This hotel-spa surge will be taking place across many cities/regions that westerners can't even yet name, and in destinations as surprising as Tibet. (i.e., the St. Regis Lhasa Resort/Iridium Spa just opened, promising to be “the highest luxury resort spa in the world.” Western explorers now heading east will find opulent spa resorts and wellness retreats at attractive prices compared to what they would pay for the same (or less) luxury back home.

...It's all eyes on Asia, as a new “Spa Road” stretches from India and China to Thailand and Indonesia. The hotel and spa explosion over the next few years will be phenomenal, and it's only the tip of the iceberg.



Courtesy of Starwood Hotels and Resorts



- The brand-new **ST. REGIS LHASA RESORT**, featuring a dazzling new spa and spa brand, Iridium, promises to be the highest luxury resort in the world, as well as Tibet's first.

EXAMPLES OF THE ASIAN HOTEL BRAND EXPLOSION:

- **Banyan Tree**, an early entrant into the Asian spa market currently operates 30 resort hotels, spas and galleries around the world (under its brands, Banyan Tree and Angsana). Targeting 56 sites operational by the end of 2013, plans include 22 sites in Asia-Pacific (18 in China).
- **Taj Group** (owned by Indian Hotels Company) plans to open 43 new properties over the next four years. Many will include the group's resort spa brand, Taj Exotica. Company just launched upscale brand Vivanta by Taj: 22 in India, 12 in pipeline.
- **Marriott International**: 89 new Marriott Hotels in India by 2015, including a Ritz-Carlton brand introduction.
- **Starwood Hotels & Resorts**: 60-plus hotels in China now, with 86 in the pipeline; 27 properties in India, with 16 on the way. (The Starwood Chinese pipeline: 24 Sheratons, 13 Westins, 7 St. Regis').
- One-third of **InterContinental Hotel Group's** pipeline is in Asia.
- **Accor**: 50 hotels planned in India.
- **Hyatt**: 40 hotels planned in India.
- **Hong Kong-based Langham Hotels**: 10 luxury hotel spas in development across China, India and Thailand.
- **Conrad Hotels & Resorts**: 10 luxury hotel spas planned, from Thailand to Bali.
- **Carlson** to open 19 additional hotels in India by the end of 2011, to have more than 100 hotels across India by 2015 and to grow its global portfolio by at least 50% to more than 1,500 hotels by 2015.



**NEW LIFE FOR
“OLD-SALT”
THERAPY**

3

SALT ROOMS & SALT CAVES

Salt Therapy Comes of Age

Yes, you heard right, spas are busy designing new ways to up your salt intake! A rediscovery of the therapeutic benefits of inhaling (and being physically immersed) in salt-infused environments is underway, and new salt rooms/caves at spas and dedicated salt therapy (“halotherapy”) centers are springing up across the world.

Basking in naturally occurring salt caves (“speleotherapy”) is a centuries-old Eastern European health tradition, and spas are recreating the natural salt cave microclimate using technology that precisely infuses pure salt and negative ions into the air. But this “old-salt” therapy is coming of age in stylish, new ways: Spa-goers can now take their salt in dramatic stalactite-drenched grottoes (comprised of tons of imported Himalayan salt crystals) or in chic, hyper-modern rooms made of sea salt blocks. Spa-goers glide through inches of salt, curl up on a lounge in the cocooning, tranquil whiteness and breathe in.

More than folk tradition is behind the spa-salt resurgence: Medical studies reveal it’s beneficial for respiratory illnesses like asthma and allergies, skin conditions like acne and psoriasis, and even cystic fibrosis. (On a side note, asthma is a global epidemic: 300 million people worldwide suffer, with 40% estimated to be children. Therefore, many of the new salt therapy “day” centers feature dedicated kids’ rooms, while home salt-inhalation devices are also on the rise.)

Salt inhalation rooms come in two varieties: steam (a salt steam bath) or dry. On the hotel/resort front, they’re best suited for larger spas, adding a new twist to existing traditional hydrothermal facilities — and, of course, they are most relevant to inland properties away from the sea. And with no need for a therapist’s involvement/labor costs, salt therapies are very attractive to spas.

Prediction: More salt therapy “time” integrated with massage, meditation or yoga to maximize the experience.

Note: A cousin to the salt inhalation trend is oxygen inhalation therapy, now appearing on more global spa menus, particularly those in high altitude areas. And watch for an increased emphasis on scent in general. While spas have always been cognizant of the impact of scent (incense, aromatherapy and scented candles are common), the focus is evolving into powerful new concepts like scent branding and marketing and ambient scenting. Researchers reveal that yoking spa/hotel experiences to special scents makes for a deeper brand connection - something spa-goers have always intuitively known.



Courtesy of Spa at Aria/Aria Resort & Casino

The **SHIO SALT ROOM AT ARIA, LAS VEGAS**, features walls of illuminated salt bricks, salt lamps and lounge chairs that provide vibration therapy in rhythm to sensual music.



Courtesy of Paul Clemence

- Spa-goers at **CASTADIVA RESORT** in Lake Como, Italy, can dive into a floating pool upon exiting the Himalayan salt room.
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A FEW FORWARD-THINKING EXAMPLES:

- 1,000-plus traditional Eastern European salt caves/spas
- CastaDiva Resort (Lake Como, Italy): Exiting the Himalayan salt room, guests can dive into a floating pool, suspended on the lake.
- Aria Resort & Casino (Las Vegas, U.S.): Hypermodern “Shio” salt room, featuring walls of illuminated salt bricks and massage chairs vibrating in sync to music.
- Taba Heights Resort (Sinai, Egypt): New “Dead Sea Salt Cave.”
- Atlantis Casino (Nevada, U.S.): Offering a brine inhalation room, with the added feature of light therapy.
- Numerous salt therapy day centers, where devices pump salt into hermetically sealed rooms fashioned after European salt caves: Salt Chalet (California, U.S.); Salt Therapy Spa (Dublin, Ireland); Galos Caves (Illinois, U.S.), Salt Therapy Health & Wellness Center (Ontario, Canada), etc.
- Popular post-treatment: Oxygen Lounge at Remède Spa at the St. Regis Resort, Aspen, where guests can experience fruit-infused oxygen.
- Inhalation Therapy at Terme di Saturnia, Italy, where the property’s famous thermal water is nebulized.
- Pure Spa and Oxygen Bar in British Columbia.



Courtesy of ESPA

SPOTLIGHT ON SPA BRANDS

4

SPA BRANDWAGON

From Luxury to No-Frills, Spa Brands Take Center Stage

The modern spa industry is young, and historically, it's been fragmented: The majority of spas operate a single facility. While spa brands have existed since Elizabeth Arden opened her second "Red Door" a century ago, generally, the industry hasn't cracked the large-scale brand expansion code. Until now: 2011 will prove a breakthrough year for global spa franchise expansion and spanking-new spa brand models.

Spa-goers are about to have an unprecedented number of global brands to choose from. And unlike the facelessness one associates with "McBrands," the new spa brands are working overtime to create unique identities and offerings so consumers will be able to choose from a hip, urban Bliss or Exhale spa, or the eco-friendly "barefoot luxury" vibe of a Six Senses. In addition, people can select from more price-points than ever before: from the over-the-top luxury of a Mandarin Oriental, to the three- and four-star properties now developing spa brands, to a super-affordable, no-frills option like a Massage Envy (800-plus franchises awarded across the U.S.). With 80,000-plus spas worldwide, many consumers will embrace the "knowability factor," with brands offering them consistent spa experiences wherever they happen to live or travel.

ESPA (in over 50 countries) can be credited as first to un-riddle how to make the spa brand equation work globally. And now brands are aggressively moving into hot, emerging markets like China and India (i.e., L'Occitane, Woodhouse Day Spas, etc.); brands indigenous to emerging markets are expanding (China's Dragonfly or Spa Moment chains, etc.); and major hotel brands are busy launching carefully crafted new brand concepts.

Newly minted hotel brands charging to market include: Sheraton's Shine spas (planned for all global properties by 2012), Hilton's eforea concept (to be rolled into 80 global properties by 2013), Steiner's Chevana spas, W's Away spas, Le Meridien's Explore spas, Marriott's Saray spas, and a new Iridium spa brand for St. Regis properties. There is even a "no

Massage Envy
SPA®



WILLOW STREAM
A FAIRMONT SPA

CANYON RANCH®
The Power of Possibility.



Chi
THE SPA AT SHANGRI-LA



LEADING
SPAS



MANDARIN ORIENTAL
THE HOTEL GROUP

ESPA

therapist” spa franchise, Planet Beach Contempo Spas, expanding from Australia to South Africa. Another breed of “brand,” Leading Spas of the World, an organization that curates fine spas worldwide and helps consumers make decisions in a crowded market. Its strict standards, along with frequent evaluations of its Leading Spas properties, result in a reliable measure for consumers looking for the best.

Many of the brand-new brands are taking angles such as: 1) affordability; 2) greatly simplified and sub-branded menus, i.e., three to five “signature spa journeys”; and, 3) an attempt to balance turnkey menus and design with some nod to local specificity (i.e., a percentage of the menu is dedicated to regionally-specific treatments, etc.).

Fueling this historic “spa brandwagon”: sheer globalization; a vast, mainstream global spa market; a strengthening economy; the desire for spa standards; and the advantages economies of scale bring to larger enterprises.

A Few Additional Brands on the Move: Banyan Tree, 63 locations; Bliss Spas, 21; Blue Mercury, 30; Body Minute, 221; Champneys, 12; Clarins, 136; Dove Spas, 12; Dragonfly, 14; 75 managed ESPA's with 30 under construction, new brand “ESPA Life” 10 in 2011; Exhale, 15; Facelagic, 40-plus; Fairmont Willow Stream, 17; Hand & Stone Massage & Facial Spas, 30; Mandara, 72; Mandara's Chavana, 4; Massage Envy Spas, in conjunction with Murad, 600-plus; Massage Heights, 50-plus; Raffles launching a new concept called Raffles Spas; Red Door, 32; Red Door's all-new Simply Face+Body, 1; Sanctuary, 2 (with 4 opening in 2011); Spa L'Occitane, 40-plus; Swissotel launching “Purovel Spa & Sport,” 7 in first year; Woodhouse Day Spas, 23. (Note: Each one has significant expansion plans in the works.)



Courtesy of Hilton Hotels & Resorts

The lounge at **eforea**, the new spa brand created by Hilton.

New spa brands are **working overtime to create unique identities and offerings** so consumers will be able to choose from a hip, urban Bliss or Exhale spa, or the eco-friendly “barefoot luxury” vibe of a Six Senses.

A young woman with dark hair pulled back, wearing a light blue t-shirt, is lying on her stomach on a white sofa. She is looking at a laptop screen with a wide, joyful smile, her mouth open as if shouting or laughing. Her hands are raised in the air, one near her head and the other near the laptop. The background is a bright, out-of-focus living room. The text 'FINDING DEALS ONLINE!' is overlaid in large, white, bold, sans-serif font across the middle of the image.

**FINDING
DEALS ONLINE!**

5

DEALS GONE WILD

Online Group-Buying Explodes Around the Globe

Remember when coupons were unfashionable things people snipped out of the paper? And when spa deals were mostly found on chalkboards near the spa reception desk? (Or, when spas didn't even discount or consider using the term "deal"?) Well, put an "e-" or "group" in front of "coupon," and you suddenly have the hottest Internet trend of 2010, poised to accelerate at an even more dizzying pace in 2011.

Online group-buying deals and flash sales have suddenly burst onto the global scene, and the old-fashioned "deal" has morphed into a hip online industry. And with spa and wellness deals being such a mainstay of generic sites like Groupon or LivingSocial (where roughly 20% of total deals are spa-related), it's a sure sign that spa-going has achieved massive, mainstream traction.

The phenomenon is mushrooming globally, with 500-plus major group-buying sites estimated worldwide. North America alone has 130 "daily deal" sites, including first-mover Groupon and LivingSocial, the DealList, Yelp, BuyWithMe, etc. The UK has its Groupalpas and Wowchers, Spain its Groupalias,

Australia its Jumponits, Scoopons and Spreets, China its QQTuans and Meituans, Thailand its Ensogos and Sanook Coupons, and Singapore its AllDealsAsia. Dozens of sites cater to a single city. And look for major expansion efforts by the powerhouses — Groupon is already moving into places like Hong Kong, Singapore, Philippines, Taiwan and China.

And with so many spa deals (treatments, yoga classes, even Botox) being blasted into email inboxes, there has been one extraordinary effect: Millions of people are now expanding their spa/wellness horizons, trying new spas and experiences they wouldn't have without the "50%-75% off!"



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With so many companies backed by hundreds of millions in venture capital, deals will certainly remain a huge deal in 2011. Here is what we see ahead for the spa consumer and industry:

Consolidation: Consumers will still have an overwhelming number of sites to follow, but a “dot-deal” shakeout (on the dot-com model) looms, in part because of an avalanche of similar “cookie-cutter” sites, along with players like Groupon marching across the globe buying and re-branding local deal sites. Branding and meaningful differentiation will become important factors in determining the “shakeout” winners.

More personalized and spa-specific deals: Spa deals have typically been thrown in between blow-out specials on lube jobs or “two hours of whitewater river rafting,” but new personalization science and software, and the rise of luxury and spa-specific platforms like Gilt City or SpaFinder’s SpaRahRah, will deliver discriminating spa-goers more relevant deals, even “curated” by experts. With the more exclusive customer targeting, higher-end spas (that avoid mob deals like the plague) will jump in to offer more luxury and unique experiences far beyond the \$39 massage or facial. For many, the spa deal quest will evolve beyond the rock-bottom price at any old place, to seeking and finding credible, real values (i.e., \$130 for \$300 worth of spa services) at a location you actually dream of visiting.

More manageable, exclusive deals: “Flash-mob” deals that have a small day spa selling 5,000 massages

have led to well-publicized gripes by both businesses and consumers (no appointments, short-shrift service, etc.), leaving spas so overwhelmed that businesses are jeopardized. Look for the parameters of deals to become more exclusive, flexible and manageable.

Location-based and mobile “deals on the spot”: With location-based powerhouses like Facebook, Google (especially after its recent, failed attempt to buy Groupon) and Yelp getting in on the action, deals will soon be even more ubiquitous online, as well as headed to your mobile phone. Right around the bend: A spa-seeker launches a mobile app, finds real-time deals in that area, clicks and buys the coupon and then strolls into the spa to redeem.

Retention and engagement: In 2010 spas embraced group-deals to attract new customers, but in 2011 there will be a much more intense focus on how to retain them with new tools, training and technology to engage customers after the hordes rush in.

Deal fatigue: Look for some consumer push back, especially from the spa enthusiast, who is, after all, seeking stress reduction. Ultimately for them, having a regular spa appointment with a favorite therapist at a familiar spa will trump the few dollars saved and the energy needed to engage in deal frenzy.

A woman with blonde hair is lying on her stomach on a green massage table, receiving a back massage. Her eyes are closed, and she has a peaceful expression. A therapist's hands are visible, massaging her back. The scene is set in a spa environment with soft lighting and a white towel under her head.

PROVEN BENEFITS

6

THE SCIENCE OF SPA

Evidence-Based Medicine Fuels Industry Growth

Is there scientific proof that massage reduces stress? Are mud packs and mineral baths medically proven to alleviate pain? Is ear candling proven to remove earwax? The answers: yes, yes, and no. Get ready for a new era where more questions about the effectiveness of spa therapies and spa products will be asked, and where these questions will get answered more transparently as the emphasis on evidence-based medicine and the “science behind spa” heats up

Science is about verifiable knowledge and adhering to the method of documenting outcomes and effects. Well, there’s a growing body of medical evidence about the proven benefits of spas’ ever-expanding wellness approaches like massage, meditation, acupuncture, healthy sleep, weight loss, hydrotherapy, exercise, etc., which are now becoming more available and visible.

Take for example the recent *New York Times* article, “A Good Massage Brings Biological Changes Too,” reporting on a Cedars-Sinai study that revealed a 45-minute massage resulted in a significant decrease in stress hormones, while boosting immunity. Or a recent study in the *American Journal of Physical Medicine & Rehabilitation* documenting that pain caused by knee osteoarthritis was significantly alleviated by two weeks of spa therapy, including mud packs and mineral-

water baths. In just one recent month, medical studies revealed that mindfulness therapies can improve quality of life in multiple sclerosis patients, adequate sleep is crucial to losing body fat, and increased exercise reduces breast cancer risk. The evidence is not all new: Medical professionals (especially in Europe) have been prescribing spa therapies for decades, and thousands of studies are buried in archives around the world. (For example, much of the evidence on the benefits of another 2011 trend, salt inhalation/halotherapy, comes from Russian medical studies.)

At the 2010 Global Spa Summit, Dr. Kenneth R. Pelletier, clinical professor of medicine at major U.S. university hospitals, put forth what more integrative medical experts are increasingly arguing: There is no larger body of scientific evidence that exists than the

**Systematic Reviews, Meta Analyses,
Cochrane Collaboration**

Randomized Controlled Trials (RCT)

Quasi Experimental with Control Group

**Pre-Post-Designs, Non-randomized,
Observational**

**Case Studies, Case Series, Surveys,
Anecdotes, Qualitative Research**

Research Evidence Hierarchy

Dr. Kenneth Pelletier, is a renowned doctor, author and integrative and alternative health expert who uses this Research Evidence Hierarchy to describe the authority of various types of research. He is a clinical professor of medicine at the University of Arizona School of Medicine and the University of California School of Medicine, San Francisco (UCSF).

archive proving that mind-body approaches work — while, conversely, there are numerous studies (i.e., the Cochrane Collaboration in London) revealing that only 30% to 35% of conventional medicine is adequately evidence-based. Dr. Pelletier challenged the spa industry to “be less conservative and get organized about generating and communicating the evidence-based data about the efficacy of its various approaches and therapies.” And that’s exactly what we’ll see more of in 2011, with industry projects underway to aggregate and curate into an accessible database and promote existing scientific research highlighting the medical value of various spa modalities.

There is always the frustrating circularity that with the vast majority of medical research funding coming from the pharmaceutical companies’ deep pockets, their offerings have the most evidence to back them. But with more medical professionals embracing integrative and alternative medicine — greater awareness that the colossally expensive traditional healthcare system is less focused on “staying healthy” and more narrowly on “disease management” — and consumers more proactive about their own well-being, look for clinical studies on everything from the effects of massage on pain, anxiety, and depression, or immune health in preterm infants, to how eating green, leafy vegetables prevents diabetes, to accelerate next year.

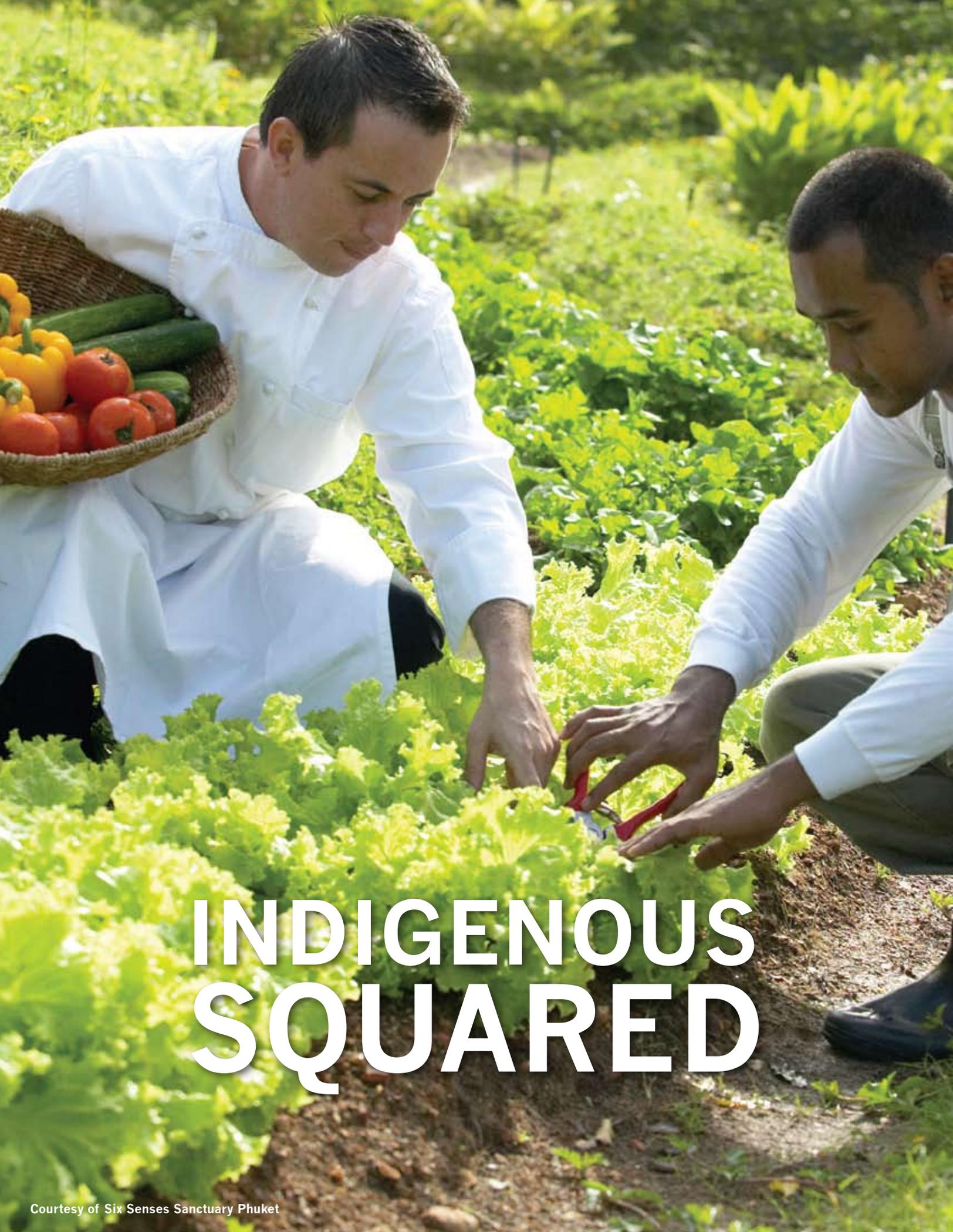
And as so many more hospitals not only co-opt the “look of spa,” but also directly incorporate spa and wellness therapies on site, consumers will have powerful visual evidence of “medicine” validating “spa.” Example: The new Inspiritas Spa (brainchild of oncologist Dr. Amy Lang) on site at the START Cancer Center in San Antonio, Texas, which revolves around massage/energy therapies like reiki, mind-body interventions (including meditation), acupuncture and nutrition treatments for cancer patients and their caregivers, all in a gorgeous space rivaling any luxury spa. Their message: “All modalities offered are evidence-based...”

Another key way the spa industry will get more aggressive on the evidence-based front: Smart spas will start specifically yoking their offerings (in marketing messages, on their websites, in talking to clients) to this growing archive of medical data.

As these initiatives and forces accelerate, the benefits of spa and wellness will not only be increasingly heard, but also believed by more consumers (often desperately) seeking health alternatives by doctors who prescribe, by public officials who legislate, and by insurers who reimburse. These nascent evidence-based initiatives should ultimately prove to be the bedrock for future, and perhaps unimagined, industry growth.



A recent study in the *American Journal of Physical Medicine & Rehabilitation* documented that **pain caused by knee osteoarthritis was significantly alleviated by two weeks of spa therapy**, including mud packs and mineral-water baths.



INDIGENOUS SQUARED

7

HYPER-LOCAL

Grow Your Own Food & Treatments. Literally.

Spas have been trying to move away from the generic “could be anywhere” vibe for years, meeting spa-goers’ intensifying desire for authenticity and immersion in treatments, food, design, and experiences indigenous to the spa’s unique place and culture. A maple scrub in Canada, organic food from the spa garden in Thailand, or facilities built of local stone in Italy, while not new, were, until relatively recently, novelties.

Spas are now going hyper-local, putting unique twists on the “farm-to-table” movement, with farm-to-spa cuisine and farm-to-massage-table treatments. (Fruits, herbs, honey, etc. are grown on site, and then dished up in both meals and in treatments and products.) Hyper-local also means ramped-up community and philanthropic projects; 100% locally sourced building materials; mandating local staff hiring policies; and finding creative new ways to connect people more deeply with place and nature. Guests aren’t just passive consumers of the experience: They’re gardening, farming, preparing their own food, making expeditions to local artisans and schools, and even helping with wildlife rescue work.

A couple of years ago spas hit, maybe, a couple of local angles. But these new über-local spas are locally embedded on almost every imaginable front. Call it “indigenous squared”...or even “cubed.”



Courtesy of Six Senses Sanctuary Phuket
Photographer Mr. Kiattipong Panchee

The landscaping at **SIX SENSES SANCTUARY PHUKET** is even edible!

ENDLESS EXAMPLES:

Hay Barn Spa (Cotswolds, UK): Daylesford Organic Farm marries a day spa to a 20-acre farm producing everything (fruits, herbs, milk) that graces both dining room tables and branded spa products. Floors are hewn from local trees, while sheep's wool from the farm's flock insulates the walls. Guests learn to grow and cook food, rear animals and make local crafts.

Hotel de la Paix (Siem Reap, Cambodia): Spa Indochine's Khmer/Jamu beauty treatments use spa products made on site daily, while restaurants source ingredients from local farmers. The spa's wide-reaching "Cambodia Community" projects engage guests with local sewing training centers and orphanages.

Blancaneaux Lodge (Belize): One of three of Francis Ford Coppola's hyper-local Central American spa-lodges, built of local materials by local craftsmen. Organic gardens supply restaurants and the spa, staff is sourced from local villages and wide-ranging local philanthropic efforts include protecting jaguars and the Mayan forest and providing four-year scholarships to local students.

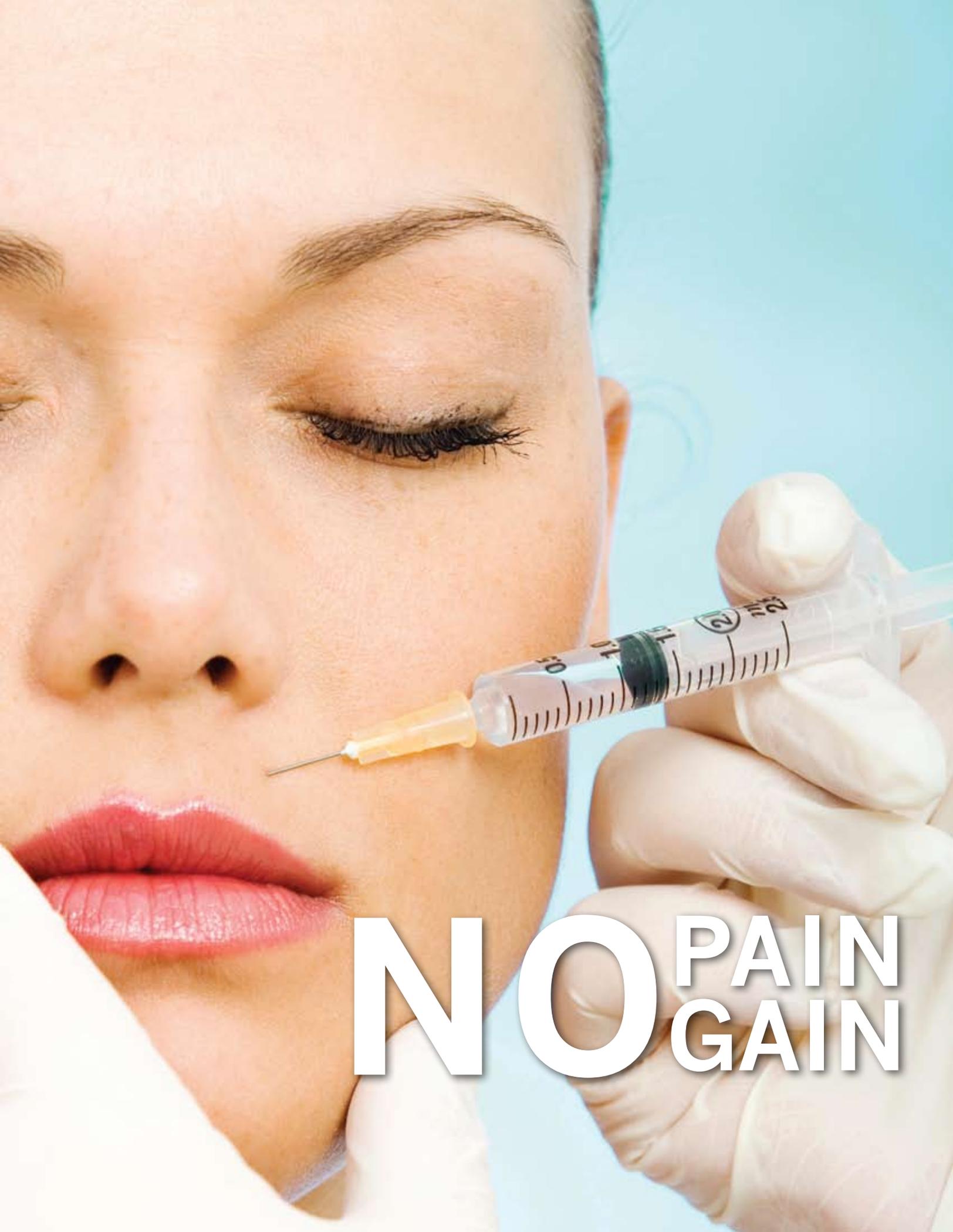
Masserio Torre Cocco (Puglia, Italy): A 500-year-old farmhouse-compound-spa built from all local materials with a spa carved out of a stone cave, and food and spa treatments direct from vast gardens, orchards and farm. In the evening, guests receive spa treatments derived from olives they handpicked themselves that morning.

Six Senses: Eight resort/spas from Thailand to Portugal, all with extraordinary permaculturalist initiatives around local food, building and design, staffing and philanthropy. At Six Senses Sanctuary Phuket, "farm" often doesn't even make it to "table," as guests can eat the landscaping!

The Farmhouse Inn & Spa (California, U.S.): Coined the "farm-to-spa" terminology, and in every meal and spa treatment the farm is intensely present.

Sukko Cultural Spa and Wellness Resort (Phuket, Thailand): Dubbed the world's first "cultural spa," guests are immersed in spaces modeled after ancient Thai villages, experiencing Thai cooking classes, Chaiya boxing, traditional Thai fruit and vegetable carving, garland making, and "cultural cuisine," where traditional Thai practitioners customize clients' diets by their element and blood type.

Tabacon Grand Spa Thermal Resort (Costa Rica): This 100%-carbon neutral resort's new wellness programs are interwoven into the local environs (situated upon an active volcano, thermal springs and tropical rainforest). At the spa's heart is a traditional Mesoamerican sweat bath (the temezcal), with therapies led by a local shaman, and the spa's 23 nature-bonding activities, which include waterfall rappelling and safari floats.



**NO PAIN
GAIN**

The common element in spa beauty these days is that beauty-seekers are pushing all known boundaries and taking it to the max.

Extremes are, of course, easy to spot when surveying the new technologies and scientific innovations appearing on the market with increasing regularity. Lash stimulators and extensions are not new, but are definitely gathering steam. We are now “beyond Botox,” the botulinum toxin (itself extreme) that fueled the medi-spa industry when the FDA approved it in 2002. There are now all sorts of fillers and other injectables with ever-increasing potency, each longer lasting than the one that preceded it. “Stem cell” is the latest lightening rod term being used (mostly by marketing departments at the moment), and applied to everything from “stem cell facials” to stem cells in skincare products to “stem cell facelifts.” Plasma therapy for cosmetic uses is also a new buzz concept...yes, that’s where a person’s blood is drawn, his or her platelet-rich plasma is extracted and then re-injected into his or her wrinkles, etc. And how about the extremely un-invasive new (FDA-approved) Ultherapy (no anesthesia, no surgery), which uses ultrasound to regenerate collagen deep under the skin, shifting the skin into a youthful position. And there’s the price-tag extremes: Facials

from celebrity skincare guru, Dangene (New York City), combining resurfacing, chemical peels, lasers, LED and oxygen therapy run \$1,250 a session...and she’s booked months in advance!

Plus, let’s talk about extreme pain, which is something people seem to be tolerating more and more, as long as it delivers the goods. Facial injectables have always been somewhat painful — derma-rolling hurts, chemical peels can be uncomfortable, and the zapping of lasers is no picnic. Facial massage, for example (long a popular component of all spa facials), is, in some cases, now being administered to the point of agony. One example is the Buccal Technique, an intense facial massage performed from inside the mouth...reported to be acutely painful, but still popular among the likes of Keira Knightley and Angelina Jolie.

Spa and wellness approaches where pain meets pleasure seem to be rising in popularity over their “kinder and gentler” brethren. Witness the upsurge in military-style boot camps, Rolfing, Bikram yoga, Thai massage and vigorous scrubs in Turkish hammams or



Spa-goers can experience cryotherapy (cold therapy), or three minutes in a room that is -110 degrees Celsius, at Canada's **SPARKLING HILL RESORT**.

Korean bathhouses. People are embracing experiences like alternating the searing heat of a Russian sauna with a dip in an icy pool because they find the results worth it. Check out the new Sparkling Hill Resort and Spa in Canada, where one of the newest European-imported modalities, cryotherapy (cold therapy), is on offer. Labeled the “cold sauna,” it involves three minutes in a room that is -110 degrees Celsius! (Champneys Tring [UK] offers another blood-chilling -135 degrees Celsius cryotherapy chamber, where the endorphin-pumping experience is followed by an exercise program.)

Facials aren't just for faces anymore; they're now being extended to every “extremity”...and we do mean the whole body. Back, foot and hand facials have been around for a couple of years, but what about “booty” and “vagina” facials? The Smooth Synergy Day Spa in New York will pamper your “booty” — exfoliate it, use microcurrent therapy to help reduce the appearance of cellulite and then even apply spray tan! Phit, another New York spa, focuses on pelvic health, and “encourages good muscle tone,” and “restores labial and vulvar contour to a plump firmness” with a process involving lasers.

Even organics and natural products are being taken to extremes, as evidenced by the extraordinary lengths many brands will go to assert their hardcore purity. “Internal beauty” is emphasized with increasing vigor. Raw cuisine is becoming popular during intense detox

retreats: Fresh Start in Canada has a 14-day detox (no pain, no gain!) with a 100% raw food menu for the 50% of days guests are actually allowed to eat solid food. Dr. Howard Murad's new book, *The Water Secret*, makes the radical, but convincing, claim that one doesn't need to drink eight glasses of water a day. Instead, one should “eat one's water” through fresh fruits and vegetables, providing our cells with a much more nutritious, effective water source. Phyto 5 products (out of Switzerland) have a unique approach, suggesting that “true beauty is health made visible,” with products that are really energy medicine. And now there's the possibility of re-attaining “virgin hair,” according to innovative new hair color products like INOA that eliminate damaging chemical developers.

And finally, what might be considered the most interesting extreme: More people's comfort levels with simultaneously embracing both the “yin” of the natural and the “yang” of invasive, medical beauty procedures. It isn't either/or anymore. (A tangible example: The popular *NewBeauty* magazine now features a dedicated SpaFinder section in each issue.) In the end, people are increasingly demanding extreme results, and they're happy to pay the price for it. At a staggering \$679 billion annually, the beauty and anti-aging sector represents by far the largest share of the estimated \$1.9 trillion wellness market.* Expect even more extremely profitable, extreme beauty innovations hitting your local spa next year.



At a staggering **\$679 billion annually**, the beauty and anti-aging sector represents by far the largest share of the estimated **\$1.9 trillion wellness market**.*

* 2010 SRI International Report, Spas & the Global Wellness Market: Synergies & Opportunities



ADDRESSING PEOPLE'S TIME

9

SPA, IN A NEW YORK MINUTE

Express Treatments for a Non-Stop World

“In a New York Minute” means in an instant, referencing how things get done faster in hectic New York City. It’s also the name of a whole suite of mini (15- to 30-minute) spa treatments (performed simultaneously by multiple therapists) at the new Auriga Spa at The Setai Fifth Avenue (New York). In our stressed-out, expected-to-be-working and on-the-go-24/7 world, we’ve all morphed into frenzied New Yorkers. And the spa industry is responding, helping people spa anytime and far more efficiently, from open early, open late, and all-night spas to “express,” “sampler” and simultaneous treatments to new, more efficient treatment technology and facility design.

Traditionally spas have kept banker’s hours, closing primly at 5-6 p.m. Just a few years ago, articles spotlighted “late-night” spas that stayed open until 9 p.m. But suddenly a 9 p.m. closing time is the new spa norm, addressing people’s real-world schedules, whether they’re seeking stress-relief in preparation for sleep, or a beauty boost for late-night partying. The Massage Envy and Bliss franchises are typical: open until 10 p.m., 7 days a week. “Open late” now means midnight, 2 a.m., or all night. A few examples: In New York, Homme Spa is open until 3 a.m. weeknights, Osaka Health Spa until 2 a.m., and Juvenex Spa around the clock. In London, Lost in Beauty’s “after-hours beauty club” performs everything from threading to massage as late as its customers want, while Chelsea’s trendy Diva Beach Club serves up mani/pedis between 9-10 p.m. and massages with cocktails from

9 p.m.-2 a.m. once a week. Seoul has all-night spa-ing at Hair Party 24 Hours; the Chinese day spa chain Dragonfly does massage until 2 a.m.; and Tokyo has Spa Qua for 22 hours-a-day hot springs soaking. Spagoers report that not only is the night-owl spa scene calmer, but that many love the cocktail-hour “free drinks” atmosphere. But the trend is also towards earlier. For instance, most major Las Vegas spas (i.e., Canyon Ranch SpaClub, Qua Baths at Caesars Palace or Hard Rock’s Rock Spa) open at 5:30 or 6 a.m., while the Spa at Mandarin Oriental, London, opens at 7 a.m. The variety of times attracts both business people jump-starting their day and revelers calling it a night.

The trend towards “express,” “sampler” or “mini-sized” treatments will continue to rise in 2011, gratifying time- and budget-crunched consumers. Not just

At the Facial Bar at **THREE-13 SALON, SPA & BOUTIQUE**, guests know they'll be out in 30 minutes or less.



Courtesy of Three-13 Salon, Spa & Boutique

30-minute massage, but even 15-minute massage will increase, as consumers realize the critical relaxation response can be elicited quickly. More spas like Spa Helani at The Westin Ka'anapali Ocean Resort Villas (Hawaii) or Dorit Baxter (New York) will stage their massage menus in 25-50-80 minute increments. We'll see more quickie treatments like Repechage's (locations from Poland to Ghana) "Spa Express Facial," where clients grab 30-minute (or less) beauty treatments sitting fully dressed and upright at the "bar," right next to each other. There will be more à la carte sampler menus like The Mirage Las Vegas' "Small Indulgences" 25-minute treatments, each aimed at a different body part. The explosion of airport spas worldwide plays into the express trend neatly, as does the decline of elaborate rituals (foot bathing, etc.) at many spas, to get right to the heart of the matter: the therapeutic treatment.

More treatments will be administered simultaneously by multiple therapists, apparent at Swissotel, the Stamford's (Singapore) "Multi-Tasking Spa Experiences," or at The Delano, Mondrian and Shore

Club spas (Florida), where massage and mani/pedis are performed poolside. Fairmont Pacific Rim's (Vancouver) Willow Stream spa offers the Saturday morning "High Maintenance" program, where a yoga class, manicure, pedicure and brow shaping are all administered by multiple therapists in a private room. You're out by noon...

The quest for efficiencies is also reflected in new directions in facility design and treatment technologies. Global spa designers report the locker room is on the decline, being replaced by Spa Suites, where guests change and shower right in treatment rooms. It's "sweet" for the spa (eliminating non revenue-generating spaces) and wonderful for spa-goers, who will have more private, personalized experiences. Examples of the locker-less trend include: All new Iridium Spas at global St. Regis properties, i.e., the St. Regis Florence, opening in 2011, or The Waterfalls Spa at Greek Peak Mountain Resort (New York). And more spas (including the new Iridium brand) are eliminating or modifying formal reception/front desk areas and time-consuming check-ins. There's also the rise of the pop-up spa, like



Courtesy of Hilton Hotels & Resorts

Warm Bamboo Massage, a featured element in **HILTON'S EFOREA SPAS**, is gaining on Hot Stone Massage because it heats more quickly and is easier for practitioners to manipulate.

Timbers Resorts' new "Bloom Spa" at The Sebastian (Colorado) with \$2/minute therapies involving zero gravity chairs, oxygen machines and chair massage offered at après-ski time near the hotel bar.

Spas are watching their budgets too, and many hotel-resort spas are scaling back in size and featuring more compact hydro-wet areas. Water treatments are morphing into semi-private experiences thoughtfully sequenced for maximum therapeutic value. And we'll see more self-service wet areas, where guests grab product kits and perform DIY scrubs, masks, etc., on their "spa journeys." Necessity is the mother of invention: Rather than spas installing big, expensive contrast pools, watch out for "wind chill experiences" and "chilled ceramic loungers," where bathers can simulate cold plunges after thermal experiences. Hot Bamboo Massage is gaining on Hot Stone Massage because the bamboo is so much easier to heat and work with, while still providing the same incredible deep tissue penetration. (It's a featured element in Hilton's new eforea spas, rolling out to 80 locations worldwide over the next couple years.) The ultimate,

futuristic "efficiency" design concept: Planet Beach Contempo Spas' 100% therapist-free "automat" spas, where push-button machine-pods perform massages, facials and guided meditation.

Finally, the quest for stress-free efficiencies will mean more spa-seekers embracing 24/7 online appointment booking and mobile apps that let them locate, research and book spas on the fly. As smartphone usage and WiFi access explodes worldwide, hotel and spa apps are proliferating: Users can view rates in real time; read online reviews and view properties; book, modify and cancel appointments; check-in; get directions; access local tourist guides, etc. – all via mobile phones. (The opportunity is especially huge in Asia, where there are already well over 2 billion mobile phone subscriptions, representing 46% of the world market.)

Spa anytime, anywhere, for as little or as long as you want, at the price-point you can afford, helped along by new smart technologies...it's all about letting spa consumers have it their way.



**GOING
BEYOND
THE
“GOLF
& SPA”
PACKAGE**

10

SURPRISING SPECIAL EVENTS

Spa Retreats Go In Bold New Directions

Downright surprising special events and activities will continue to pop up at both destination and resort spas. The “spa surprises” will span everything from dramatically more unique, super-targeted “specialty weeks” — fun, even quirky, new activities for spa-goers — and unusual programs aimed at groups, far more imaginative than the old “golf and spa” package.

Destination spas have, of course, been doing yoga and healthy cooking “weeks” for years, but retreats are moving in bold new directions. Consider Solace Spa at Boyne Mountain’s (Michigan, U.S.) “Trapeze Experience,” where trapeze artists teach spa-goers to soar through the air like circus performers, and artsy, creativity-focused weeks like Canyon Ranch’s “Don’t Worry, Bead Happy” jewelry-making retreats, or “Raw Food Week” at Canada’s Spa Eastman and “Gluten-Free Cooking Week” at Baja California’s Rancho La Puerta. And celebrity authors, artists, actors (even politicians) now headline these specialty weeks. For instance, Soneva Fushi Six Senses’ (Maldives) recent “Dine and Dive Week” was headed up by Fabien Cousteau (Jacques’ son), and featured an island bicycle race where the slowest bicyclist wins. The trend embraces the serious: Destination spas have offered specialty weeks focused on grief counseling and support.

Hotel/resort spas (also getting into specialty weeks) will continue to surprise traditional and business groups with unpredictable programming. Consider Sanderling Resort & Spa’s (North Carolina, U.S.) monthly “artisanal butchering classes” or Stowe Mountain Resort & Spa’s (Vermont, U.S.) “Naked Table Project,” where guests make a “simple family table from scratch,” and then join tables together for a locally grown feast. The Montage Resort & Spa (California, U.S.) offers falconry and “Plein Air Painting” programs, while Joie de Vivre Hospitality’s (U.S.) boutique spa hotels’ “Joy of Meetings” program includes bubble blowing and kite flying to relieve stress in business meetings.

If therapeutic carpentry and tight rope walking are any indication, the sky’s the limit with the spa programming surprises ahead.



Courtesy of Montage Laguna Beach

Programming at **MONTAGE LAGUNA BEACH** in California varies from falconry to Plein Air Painting, surprising and challenging guests at every turn.

COUNTER TRENDS

Creating Niche Approaches By Going Against the Grain

Another perspective: the concept of the “counter trend.” Sometimes creative and successful ideas emerge when businesses move against the mainstream, with the caveat that “swimming upstream” against dominant trends requires carefully determining whether the specific market will support more niche approaches.

Trend: Aging...Raging

Counter Trend: Boomers represent the largest spa-going demographic, but Gen X and Millennials (aged at 30-45) lag not far behind. Many spas will specifically target younger generations (...more spas for kids, teens, young adults and families).

Trend: All Eyes on Asia

Counter Trend: If India and China dominate spa/hotel development among BRIC countries, don't forget Brazil and Russia. Brazil dominates the South/Central American hotel-spa pipeline, while Russia has burst into the top three in Europe for hotel/spa development, with strong growth for the CIS states. Eyes are also rightfully on the UAE, Saudi Arabia, Morocco, Egypt and other destinations across the Middle East/Africa and South America.

Trend: Salt Rooms and Caves

Counter Trend: If inhalation therapies are growing, some spas, for example, will counter with oxygen. In contra-distinction to no-therapist experiences like salt rooms, there's an upswing in therapist-intense treatments, like four-handed massage.

Trend: Spa Brandwagon

Counter Trend: There will always be a consumer segment valuing/choosing “anti-branded,” individualist, one-of-a-kind spas — where the experience is shaped by the super-distinct vision of an owner/manager.

Trend: Deals Gone Wild

Counter Trend: Deal fatigue. Means more people will prefer a regular spa appointment with a favorite therapist than chasing the few dollars saved in e-deal



AGAINST THE MAINSTREAM

mania. Also trending against the cut-rate: an uptick in ultra-luxe, expensive treatments like \$1,250 facials at certain urban spas, where appointments aren't available until April!

Trend: The Science of Spa

Counter Trend: No real OR recommended countertrend. Only counter-angles: emphasizing the sheer value of pampering/escape; being transparent about modalities without science to support them, while encouraging people to be part of “living research.”

Trend: Hyper Local

Counter Trend: Transporting people out of the local to exotic, other worlds. Examples: Golden Door's all-Japanese Roykan and themed Las Vegas spa resorts (fanciful Italian, French, Middle Eastern environments).

Trend: Extreme Beauty

Counter Trend: Spas/experiences eliminating all pursuit of beauty. No mirrors, beauty treatments — complete emphasis on mind/wellness/inner beauty.

Trend: Spa in a New York Minute

Counter Trend: Far more leisurely spa experiences emerging simultaneously. Examples: 90-minute massages overtaking 60-minute. (Mandarin Oriental, New York's new three-hour treatments!)

Trend: Surprising Special Events

Counter Trend: “Going back to basics”: Spas shortening/streamlining menus to please overwhelmed consumers.

BUZZ WORDS

Hot & Getting Hotter

Hot  Getting Hotter!

Hot Stone Massage

Bamboo Massage

Oxygen Facials

Stem Cell Facials

Waxing

Threading

Saunas

Infrared Saunas

Aging

Silver Spa-ing

De-stress

Mobility

Fitness Coaching

Wellness Coaching

Relaxing Massage

Pain Relief Massage

Groupon

SpaRahRah

Kick Boxing

Zumba

Pilates

Barre Method

Celebrity Chefs

Celebrity Stylists/Therapists/Aestheticians

Farm-to-Table

Farm-to-Massage-Table

Spa Cuisine

Gluten-Free Spa Cuisine

Hamam

Salt Caves

U.S.

Asia

One-of-a-Kind Spa

Branded Spas

Indigenous

Hyper-Local

Extreme Fitness

Extreme Beauty

Express Services

Super-Express Services

Essential Oils

Moroccan Oil

Online Marketing

Scent Marketing

Predictable

Surprising

Body, Mind, Spirit

Purpose, Meaning, Priorities

www.SpaFinder.com



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