STENDEN RANGSIT UNIVERSITY

Spa Industry Study 2013

CURRENT STATUS AND EXPECTED DEVELOPMENTS

Stenden Rangsit University / Thai Spa Association

9/18/2013

This Report presents the findings from the Spa Industry Report that was carried out by Stenden Rangsit University in collaboration with the Thai Spa Association.

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World Spa and Well-being Convention 2013

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Executive Summary

EXECUTIVE SUMMARY

This study provides a snapshot of the current actions and opinion of spa consumers and spa operators. It is an attempt to outline the current status of the spa industry, and try to evaluate and understand the expected changes and developments in the spa industry. This report focuses mostly on the spa industry in Thailand with some focus on the ASEAN region.

Spa Consumers

Tourists still remain the largest target group and Europeans (including Russians) still constitute one of the largest target group. There is an increasing shift towards more Asian spa consumers (China, Japan, India). Particularly, Spa consumers from China are expected to grow immensely in the future.

It is becoming more common for men to take care of themselves. Men are becoming more interested in wellness and beauty treatments as well. Over the last few years, the numbers of male spa consumers have increased, although there has **not** been a significant change in the male/female ratio. Nonetheless, the spa industry expects more male customers in the near future. Currently, male visitors mostly prefer massages, but it is expected that they will demand more men specific treatments and therapies in the future.

There are quite some differences between male and female spa consumers. For example, compared to female spa consumers a higher proportion of male spa consumers visit the spa with their spouse or partner. This study also found that for an average spending of THB 1,500 (USD 50) or more, proportionally male spa consumers spent slightly higher than female spa consumers. This might be due to the fact that on average male spa consumers is slightly older than the female spa consumers, and as such might have a higher disposable income.

Socializing at the Spa

The social aspect of visiting a spa is quite prominent now. A high proportion of spa consumers visit the spa with their friends. They use the treatments as a way to socialize and hang out with friends. Consumers are looking for group treatments or packages. Consumers like to talk during or after their treatments.

Changing Customer Expectations

Some of the key changes and developments in consumer expectations that this study identifies are as follows:

1. For both current and potential spa consumers, in the future they expect more authentic treatments/therapies, packages based on *discount and time spent in the spa,* and *individualized* spa packages. Potential spa consumers would also like to see more spa cuisine/healthy cuisine in spas.

2. Expectations of Asian customers are quite different from those of European customers. Currently, Asian spa consumers are looking for high tech skin care, rather than body treatments. The Asian spa consumers are getting more result-oriented and seemingly slightly less interesting in pampering treatments.
3. Spa consumers are demanding more beauty treatments, and they want to know and see the results of how these treatments are affecting them.
4. Spa customers want customized treatments that are not only relaxing and garner an emotional reaction, but also a physical difference after the treatment.
5. There is an increasing demand for spa cuisine in general. People are becoming aware of their lifestyles. The approach to achieve balance between mind and body through healthy eating is getting popular. Spa managers note that healthy snacks and juices are becoming common in spas. In the past this was seen as a trend, but nowadays spa cuisine has become a necessity and even a threshold capability for spas.

Therapies / Treatments

Currently Thai massage, Aromatherapy massage, Foot massage, Body scrub and Facials are the most commonly used treatments in the spa. In terms of proportion, female spa consumers chose to have more Facial, Hand and foot care, Body scrub and herbal compress massage; while male spa consumers have more Thai massage, Swedish massage and Reflexology massage.

It is being noted that the quality and skills of the therapists are getting as important as the treatment or the product itself. As such, spa operators believe that the focus has to be on language, behavior skills and sales training for therapists, as well as on customer service.

More innovative treatments are coming up such as therapeutic massage for 'office syndrome'.

Spa menus have been too extensive. A lot of spas are often adding new treatments, whilst not taking anything off the menu. Many spa operators were of the opinion that less is more. They try to play along with the trends and add a new treatment to their menu, but at the same time take one off. In the future menus would need to be fine-tuned, more streamlined, easier to read and it needs to be changed regularly. Seasonal promotions are seen as a good way to vary the menu regularly.

Furthermore, quite a big link has started to develop between the medical and spa industry, through the development of medical spas. Eastern and Western philosophies about healthcare are merging together, as consumers take more responsibility for their wellness. Medical spas are though quite a different field and unless proper training is provided, therapists will not have the right skills to perform medical treatments. Furthermore medical spas also need to have license to be able to provide those trainings as well as treatments.

Spa Therapists

Most current spa consumers prefer either female therapists or someone depending upon the therapy or treatment. In the study, it was found that almost 16% of current male spa consumers prefer male therapists.

The study shows that the top 3 important characteristics of therapists for both current and potential spa consumers are *pleasant behaviour*, *responding to individual needs* and *ability to explain therapies and treatments*.

When comparing the opinion of current spa consumers and potential spa consumer, it can be seen that *pleasant behaviour* is more important to potential spa consumers, whereas *responding to individual needs* seems to be more important to current spa consumers. It illustrates the fact that experienced spa consumers put a lot of emphasis on individualized attention.

In this study it was found that in the selection of therapists, managers mostly look at attitude and experience. The general opinion was that skills to properly executive spa treatments and therapies can be trained, but a good attitude is something that is very intrinsic and something that is very hard to train. Hence the focus is very high on attitute based hiring.

It was found that spa operators do not consider the nationality of the therapists to be very important while recruiting. Currently, most spas choose for therapists from within the country where the spa is located. The primary reason being that, it is easier to get work permits that way. Furthermore local hires also reduce the total salary costs. However, specific treatments do require therapists from a specific nationality. For example, many consumers find it inconceivable that an Indian therapist is doing a Thai massage.

In terms of training being provided to therapists, in addition to training on standards and specific therapies and treatments, training on language/communication skills and behavioral skills are growing in importance.

Spa Managers

The findings in the study suggest in general it is accepted that "hard skills" (business and managerial) are most important skills for spa managers to possess. Most often spa managers are expected to write marketing plans, set KPIs, make plans to achieve quality standards, guide staff and much more. It is accepted that a spa manager should know about the therapies and treatments offered in the spa in order to provide better guidance and gain a better understanding towards the therapists.

Currently, only few countries provide education courses/certifications for operating a spa. Several respondents to the study think that more professional education programs and certifications of spa managers in the future are essential and would be very useful. In the opinion of most, these programs should cover a combination of management skills and spa treatments and therapies.

Role of Standards in the Spa Industry

Most spa operators think that a national standard for operating a spa would be beneficial for the image of the spa industry. There was no dominant opinion with regards to whether voluntary standards attract spa consumers; the opinion was pretty much equally divided. However, in general spa operators believe the voluntary standards leads to higher credibility.

Impact of AEC 2015 on Spa Industry

The AEC 2015 (The ASEAN Economic Community) will transform ASEAN into a region with free movement of goods, services, investment, skilled labor, and free flow of capital. Although spa managers think that AEC 2015 will bring along some challenges, most spa managers are very positive about its impact on the spa industry.

Spa managers cite the increased investment, improved standard of therapists, tougher spa standards, and increased diversity in the spa industry as some of the positive aspects of AEC2015. Increased competition in the recruitment of skilled managers and experienced therapists, increased competition, higher need for differentiation, and greater need for language and communication skills are some of the key disadvantages that spa managers perceive from AEC 2015.

Part A:
Introduction

A. INTRODUCTION

A1. ABOUT THE RESEARCH

Stenden Rangsit University offers a Spa & Health Management minor programme in conjunction with Stenden University Bali for 7 years now. For this programme, SRU regularly invites the former president of the Thai Spa Association (TSPA), Mr Andrew Jacka, as well as the Vice President Khun Phattiraporn Khiewsanun as guest lecturers for their students. Mr Andrew is also the Chairman of the Organization Committee for the World Spa and Well-being Congress and hence proposed to SRU early 2013 to collaborate on an industry research that will then be presented at the Congress in September.

While the Thai Spa Association was the striving force in getting in touch with the industry and organized focus group meetings and interviews, Stenden Rangsit University started the preliminary research together with a group of students in April 2013. The students were part of the so-called Grand Tour exchange program that Stenden University offers to all 3rd year students. With a total of 11,000 students, Stenden university has its main campus in the Netherlands and has sister campuses in Bali, Qatar, South Africa and the Stenden Rangsit campus in Thailand at Rangsit University. After the spa research students have finished their program, the academic team has continued the work under the guidance of their research coordinator Mr Prantik Bordoloi.

A2. RESEARCH OBJECTIVES

The research was carried out in 2 parts: Spa Consumer Research and Spa Operator Research. The research focused on spa consumers and operators in Thailand and to a lesser extent in the ASEAN region. The specific objectives of each are presented in the upcoming sections.

A2.1 SPA CONSUMER RESEARCH OBJECTIVES

The objective of the spa consumer research was to:

- Identify spa consumers and study their current spa use pattern.
- Identify what consumers like the most within Spas
- Find out what spa consumers find the most important with regards to the therapists and products used in Spas.
- Identify non-spa consumers / potential spa consumers and understand their preferences for spa visits.
- Provide spa operators and consultants with insights for understanding spa consumers and potential spa consumers

A2.2 SPA OPERATORS RESEARCH OBJECTIVES

The objective of the spa operator research was to understand the perception and opinion of the spa operators on:

- The changes and developments in the clientele and how does it influence the spa industry
- The changes and developments are there in customer demands and how does it influence the spa industry
- Skills and expertise that spa manager/spa therapist need to possess
- The changes and developments are there in therapies and treatments and how does it influence the spa industry
- The role of standards in the spa industry
- Impact of AEC 2015 (The ASEAN Economic Community) on the spa industry

A3. METHODOLOGY, SAMPLING AND PRESENTATION OF FINDINGS

A3.1 SPA CONSUMER RESEARCH

We started the research with a focus group (6 participants) and targeted interviews in June 2013 to finalize the spa consumer survey questions. The survey was conducted both online and on paper.

The survey had 2 sections. One section focused on spa consumers and another section focused on non-spa consumers. As the non-spa consumers who filled up the survey were interested in spa's, and as such we refer to them in this report as "Potential Spa Consumers". We asked the spa consumers on their historical behaviour and their opinion of certain aspects of spa and also their future expected behaviour. To potential spa consumers we asked their expectation and opinion on certain aspects of spa use.

After the survey questionnaire was finalized, it was distributed online with the help of TSPA and Spa operators in Thailand. The paper survey was distributed to customers of selected Spa's in Bangkok. Shoppers in a large mall in Bangkok were also randomly selected and asked to fill up the paper surveys.

Data Collection was conducted between July and August 2013. For this research convenience sampling was used. 463 responses were received to the survey. While this sample size is not seen as being completely representative of the total spa consumers in Thailand, the sample is deemed to be large enough to draw important insights.

Averages and percentages were calculated based on the received survey responses. Some questions add up to more than 100% as multiple responses were allowed in some questions.

To keep the report concise, the findings are presented in charts and brief explanation is provided wherever appropriate. The last section summarizes and highlights some important observations.

A3.2 SPA OPERATOR RESEARCH

For the spa operator research attention was focused on Spa managers, Spa Directors and experienced spa industry professionals.

The research was started with a focus group, in May 2013, which was organized in collaboration with Thai Spa Association. The focus group was attended by 10 spa managers from Thailand. After the analysis of data from the focus group was completed, an interview protocol and questionnaire survey was created.

The expected respondents for the interviews were Spa Directors or very experienced Senior Spa Industry professionals. In total 14 interviews were conducted and each interview lasted between 30 to 45 minutes. Appendix I lists the Interview Respondents.

The expected respondents for the online surveys were Spa Managers in Thailand and abroad. The online survey was distributed to Spa Managers in Thailand and outside of Thailand with the help of Thai Spa Association. There were 86 responses to the online survey.

Data Collection was collected between June and July 2013, and the interviews and online survey was conducted simultaneously.

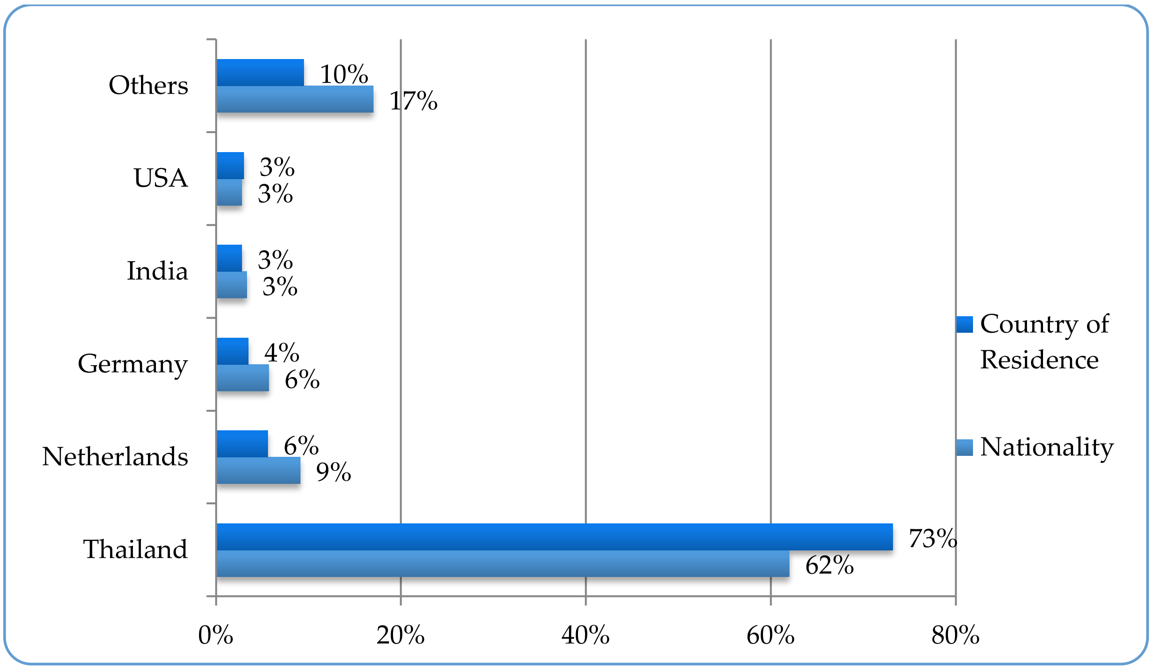
The results from the focus group, interviews and survey (quantitative) are combined and the findings are presented in specific categories. Averages and percentages were calculated for the quantitative survey responses. Some questions add up to more than 100% as multiple responses were allowed in some questions. The last section summarizes and highlights some important observations.

Part B:
Spa Consumer Research

B. SPA CONSUMER RESEARCH

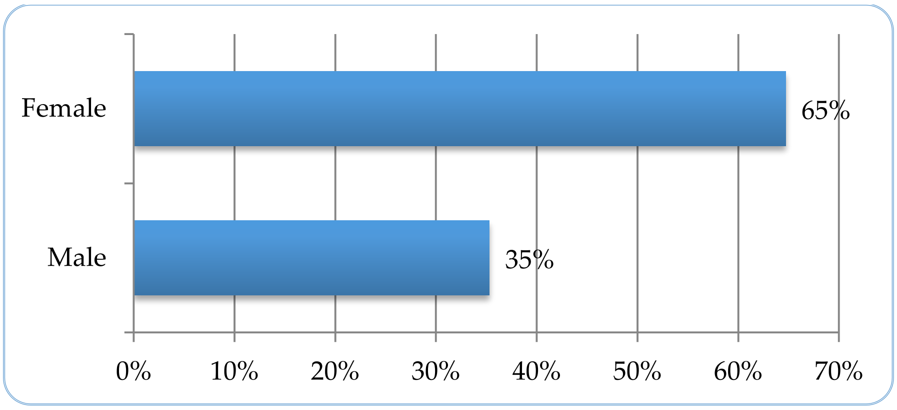
B1. RESPONDENT DEMOGRAPHICS

B1.1 NATIONALITY AND COUNTRY OF RESIDENCE



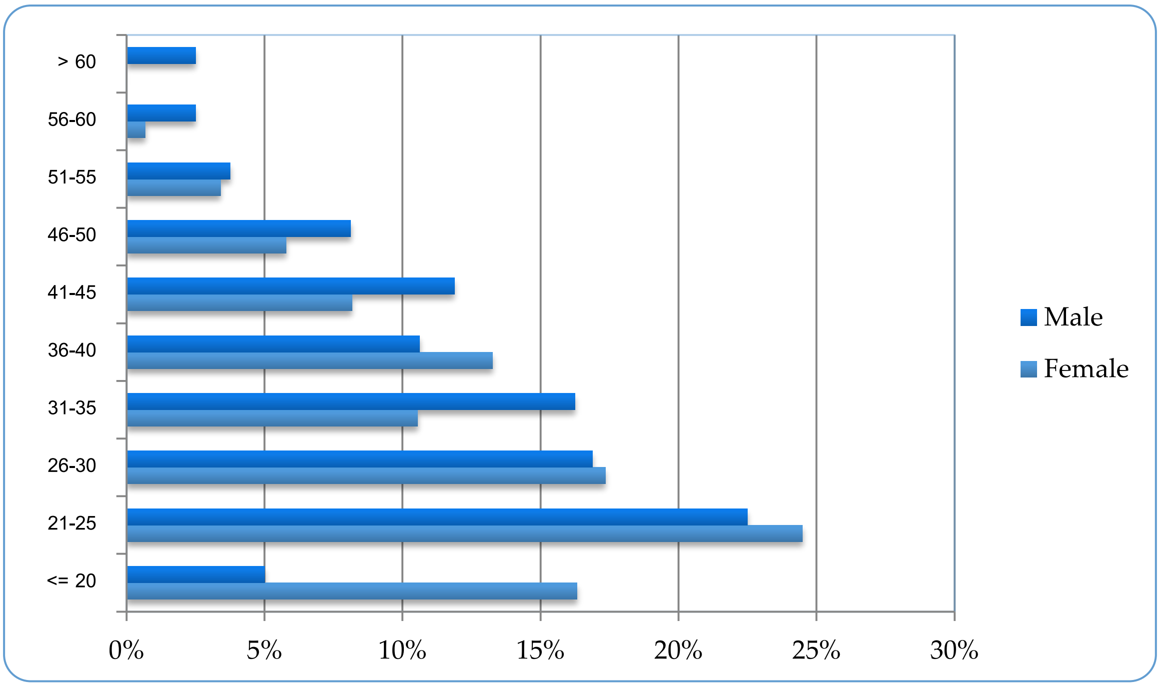
- 73% of the survey respondents were residing in Thailand, although only 62% of our survey respondents were actually Thai Citizens
- German and Dutch nationals were the next largest groups

B1.2 GENDER



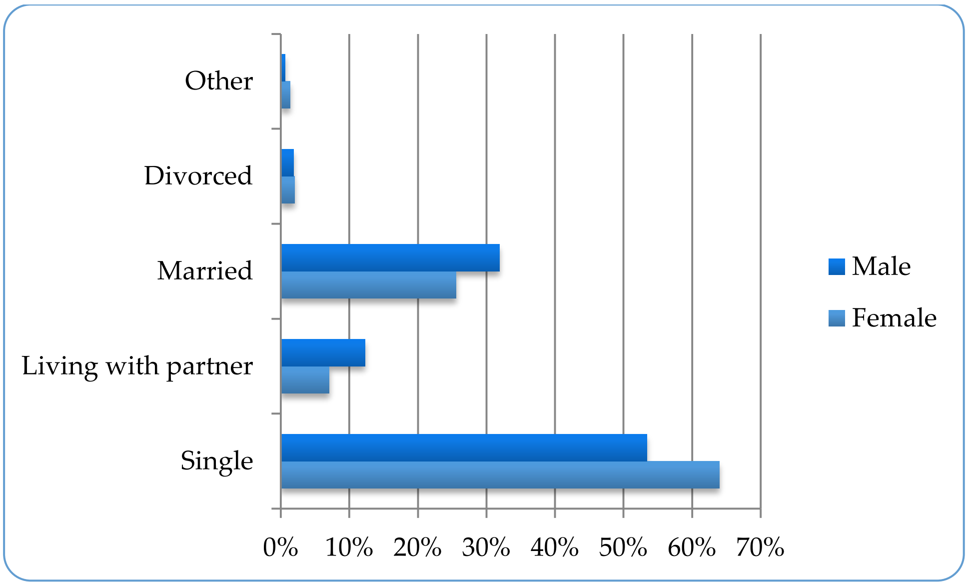
- 65% of respondents were female.

B1.3 GENDER AND AGE



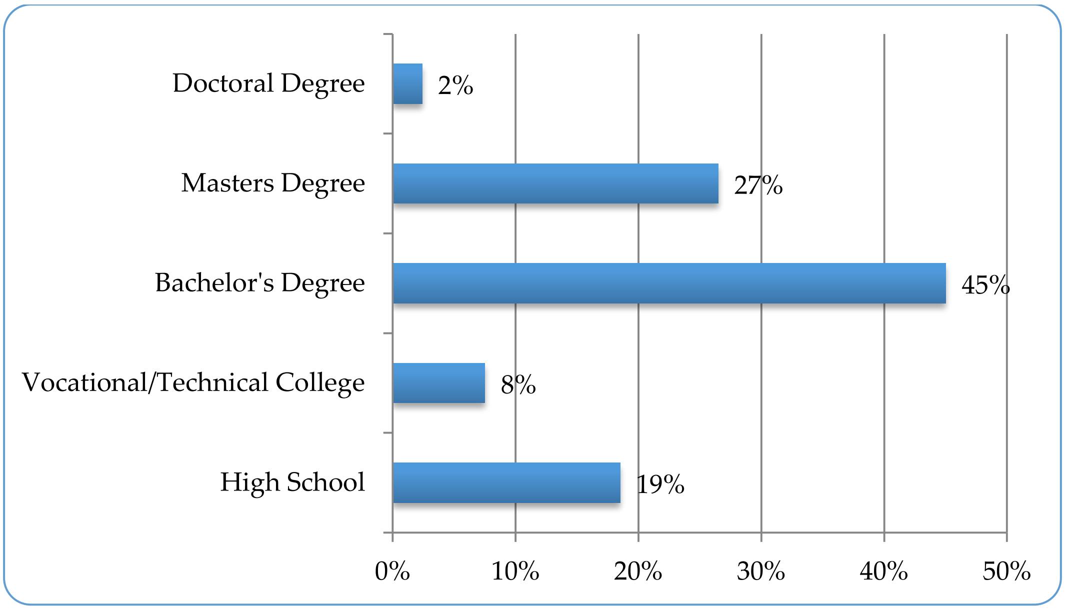
- 30% of male and 18% of female survey respondents was above the age of 40.
- 57% of female and 45% of male survey respondents were aged 30 or below.

B1.4 GENDER AND MARITAL STATUS



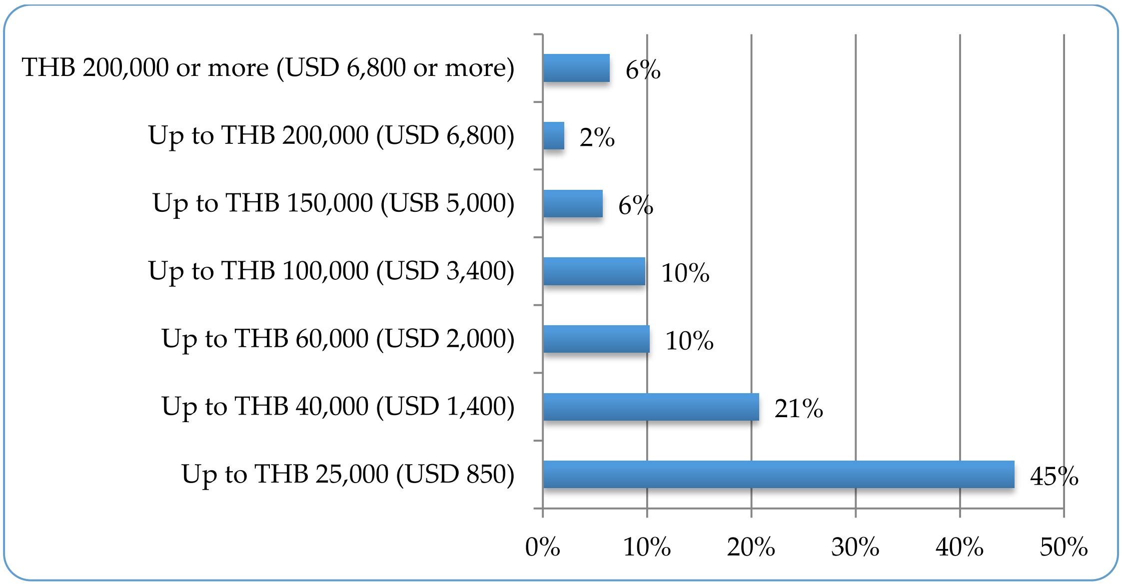
- The sample had a slight bias towards single females, but this is concurrent with the higher number of younger females in the sample.

B1.5 EDUCATION LEVEL



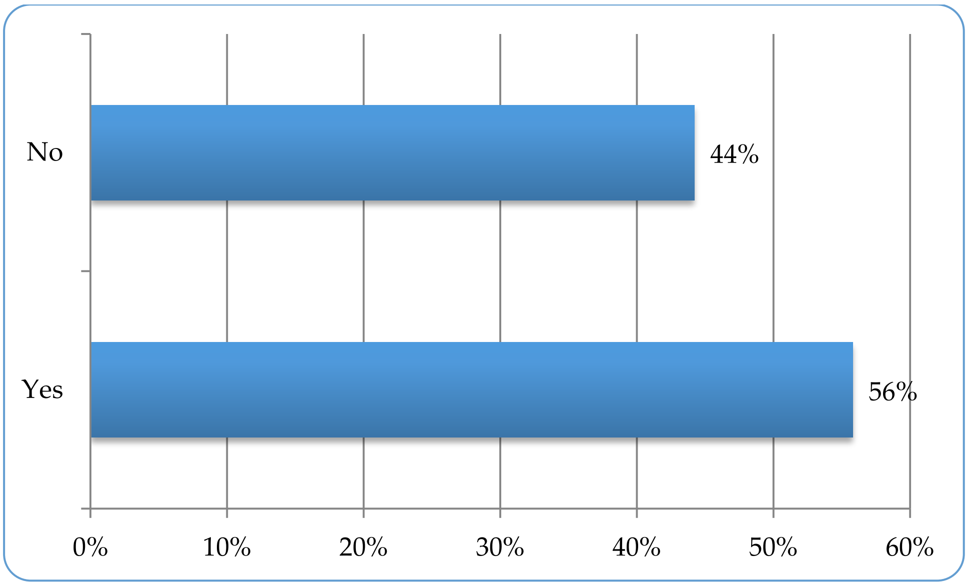
- 74% of the respondents had completed bachelor degree or more.
- 19% of respondents had completed a high school degree, but this can be explained by a sizeable number of the respondents being students at university level.

B1.6 MONTHLY INCOME



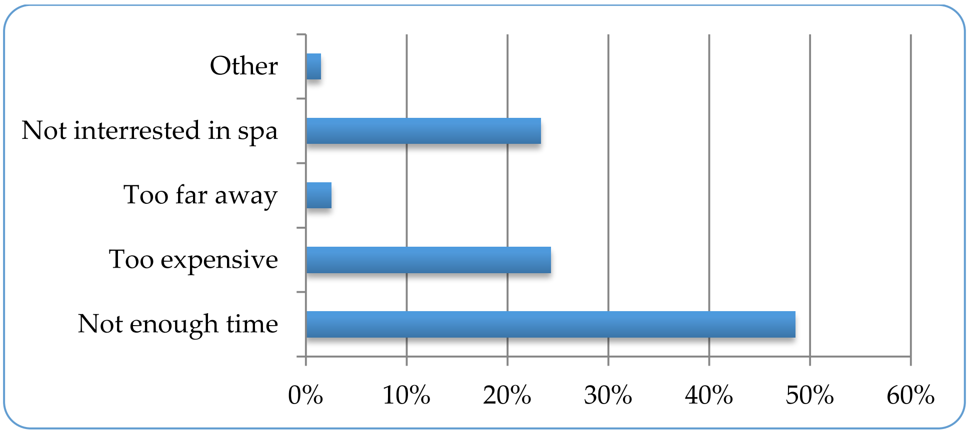
- 76% of the respondents had monthly salaries of THB 60,000 (USD 2,000) or less. This reflects the current economic reality of Thai respondents.

B1.7 SPA VISIT IN THE LAST 12 MONTHS



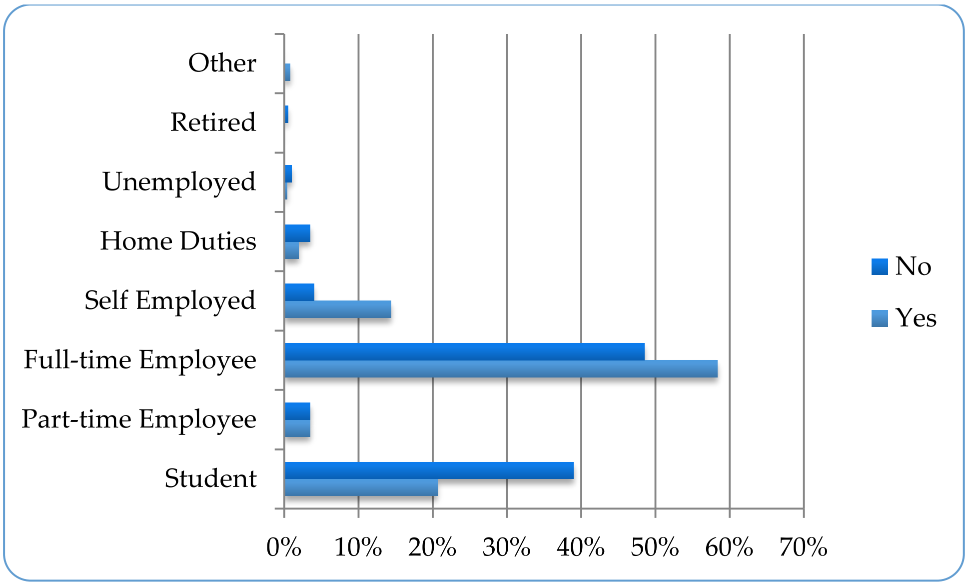
- 56% of respondents have visited a spa in the last 12 months.

B1.8 REASONS FOR NOT VISITING A SPA



- Almost half of non spa consumers cited not having enough time as the primary reason for not visiting a spa.

B1.9 EMPLOYMENT STATUS AND SPA VISIT

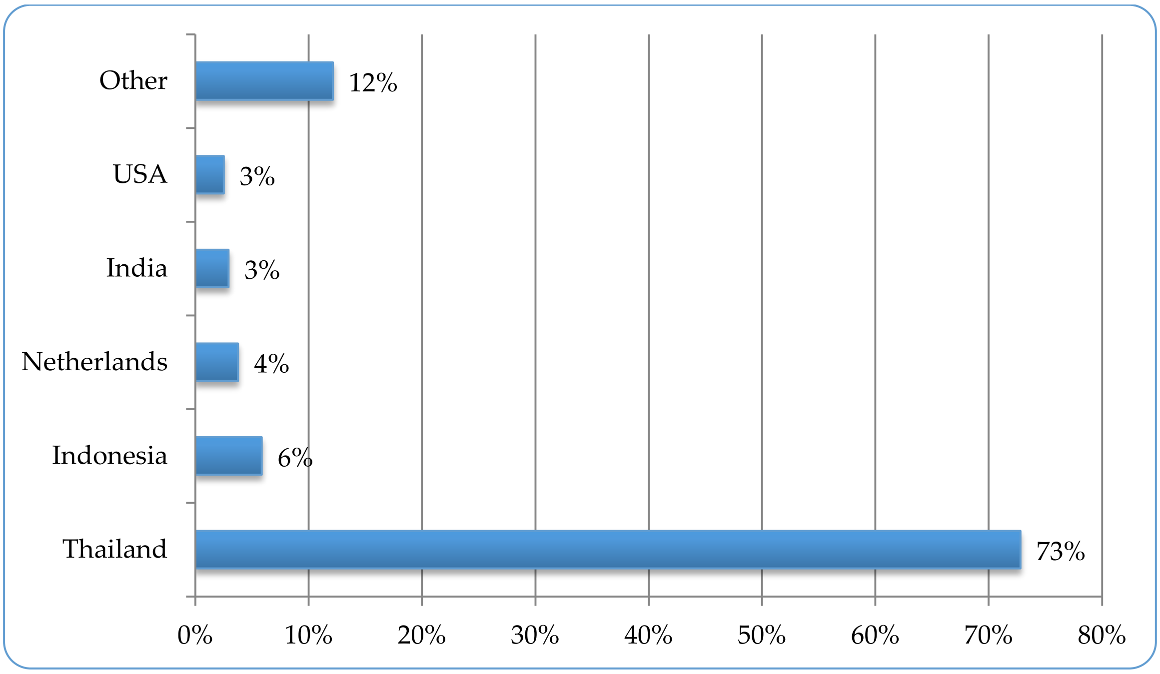


- Of the respondents, the highest group of current spa visitors was full time employees. Students and self-employed were the next highest groups.

B2. SPA VISIT CHARACTERISTICS

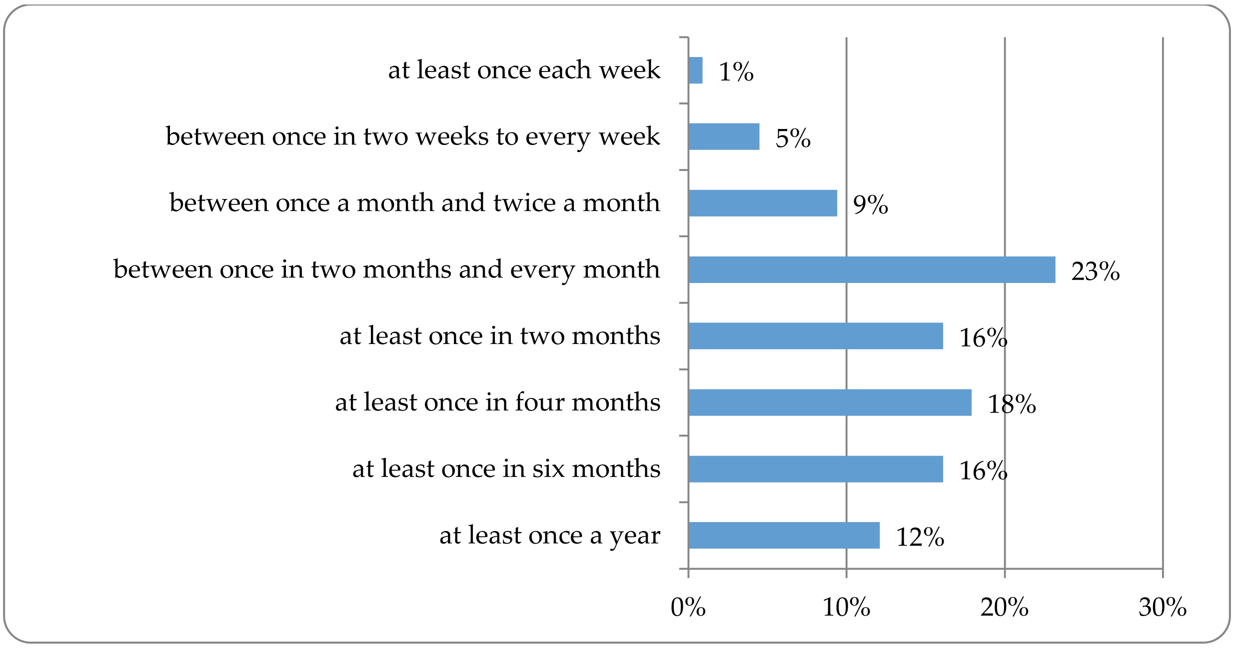
The sections below present the characteristics of the current spa consumers. The potential spa consumers were also asked to express their opinion on certain aspects of spa visits. We present the responses of the current male and female spa consumers, and wherever applicable, that of potential spa consumers and current spa consumers, with regard to spa visit characteristics.

B2.1 COUNTRY OF SPA VISIT



- An overwhelming majority of the current spa consumers amongst the respondents went to the spa in Thailand
- Indonesia was a the next most visited spa destination

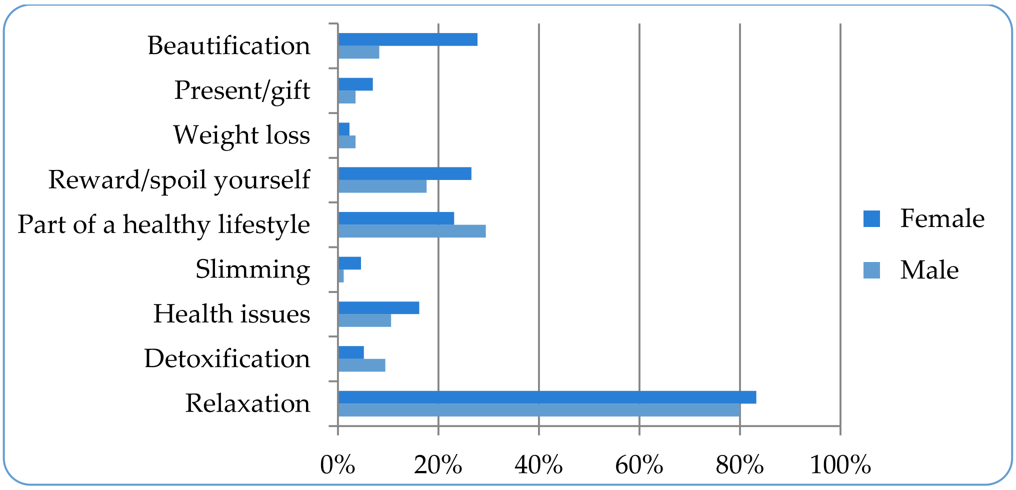
B2.2 NUMBER OF SPA VISITS



- 15% of current spa consumers went to the spa at least one a month or more.
- 39% of current spa consumers went to the spa between once in 2 months and once a month
- 18% of current spa consumers went to the spa almost quarterly.

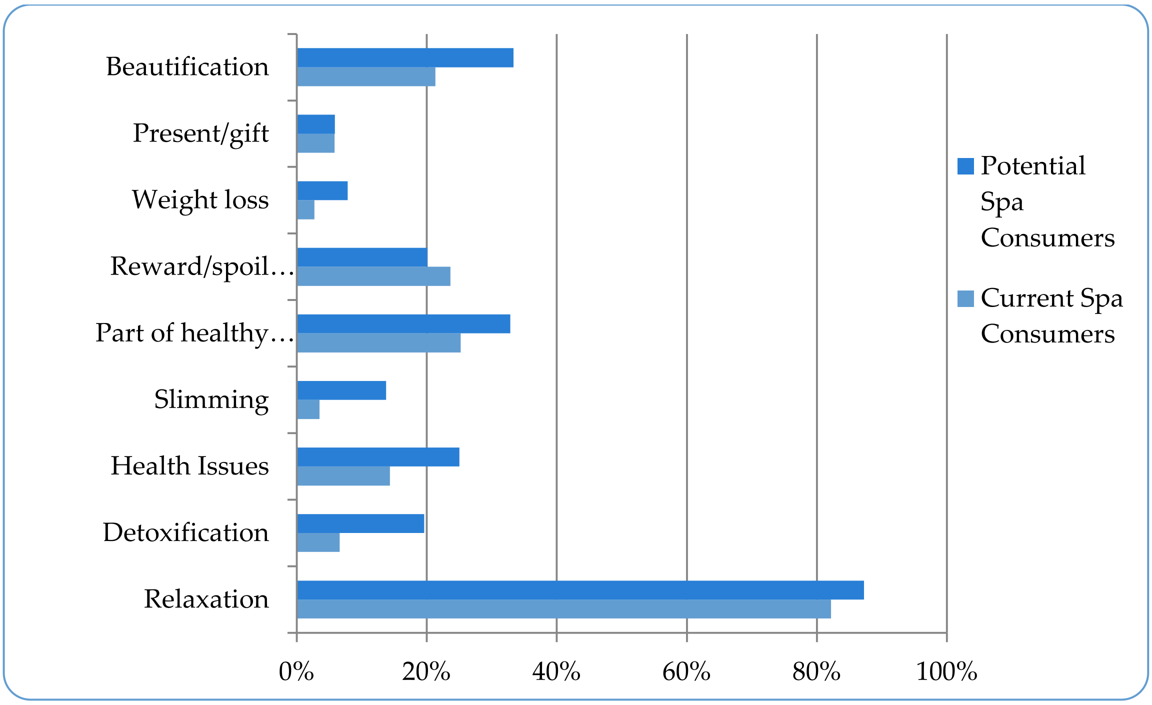
B2.3 PURPOSE OF SPA VISIT

- Majority of current spa consumers went to the spa for relaxation
- Beautification, maintaining a healthy lifestyle and rewarding / spoiling oneself were the next 3 most commonly cited reasons for visiting a spa
- Compared to female spa consumers, a slightly higher proportion of male spa consumers go to the spa for maintaining a healthy lifestyle.
- Compared to male spa consumers, a slight higher proportion of female spa consumers go to the spa for beautification and for rewarding or spoiling themselves.

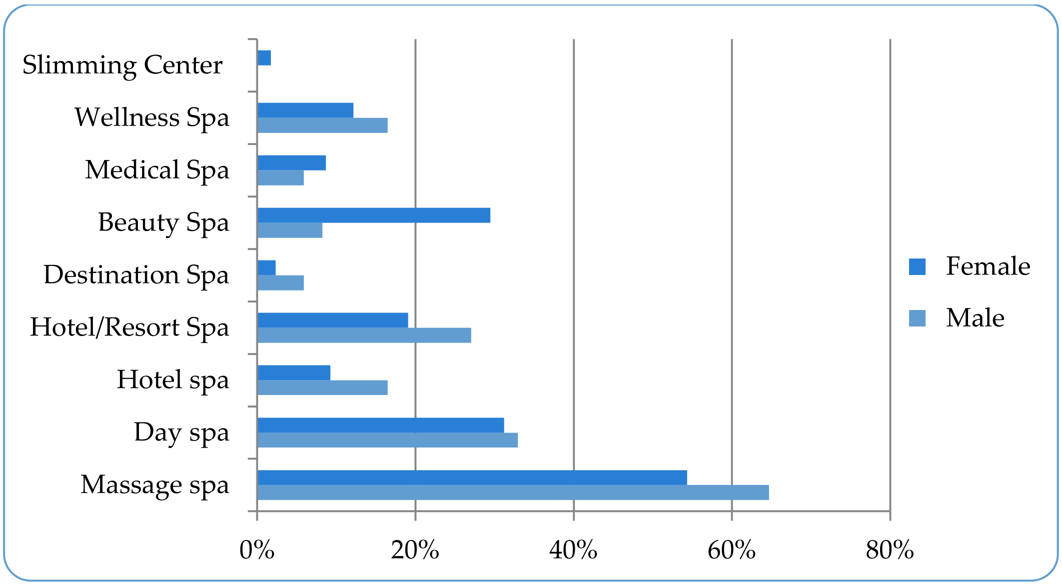


Current Vs. Potential Spa Consumers

- Majority of current spa consumers went to the spa for relaxation
- Beautification, maintaining a healthy lifestyle and rewarding / spoiling oneself were the next 3 most commonly cited reasons for visiting a spa

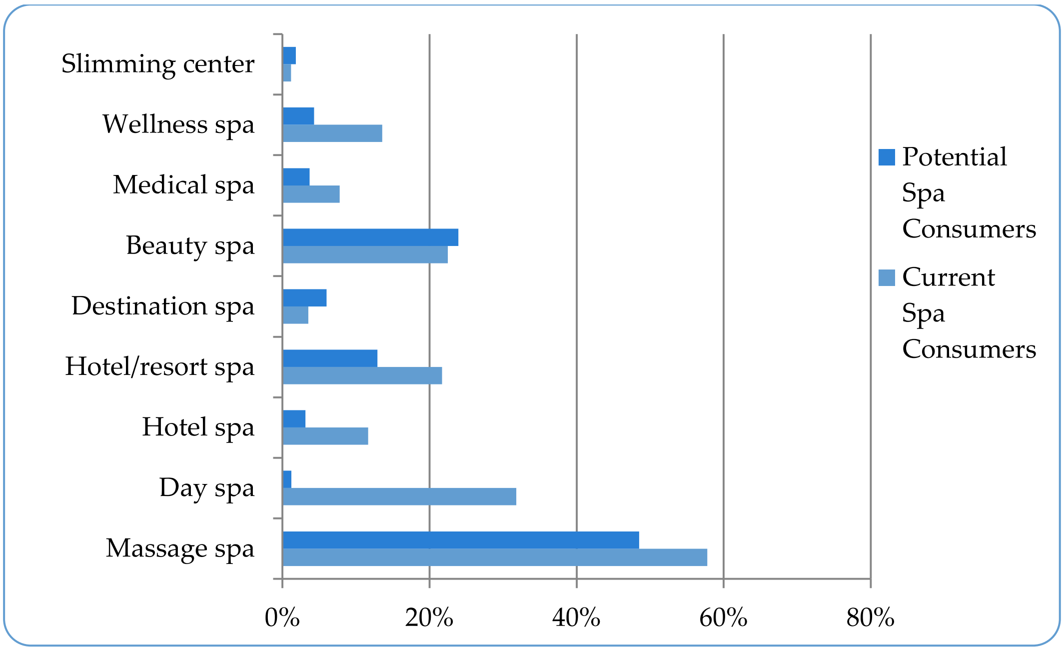


B2.4 TYPE OF SPA VISITED / INTERESTED IN



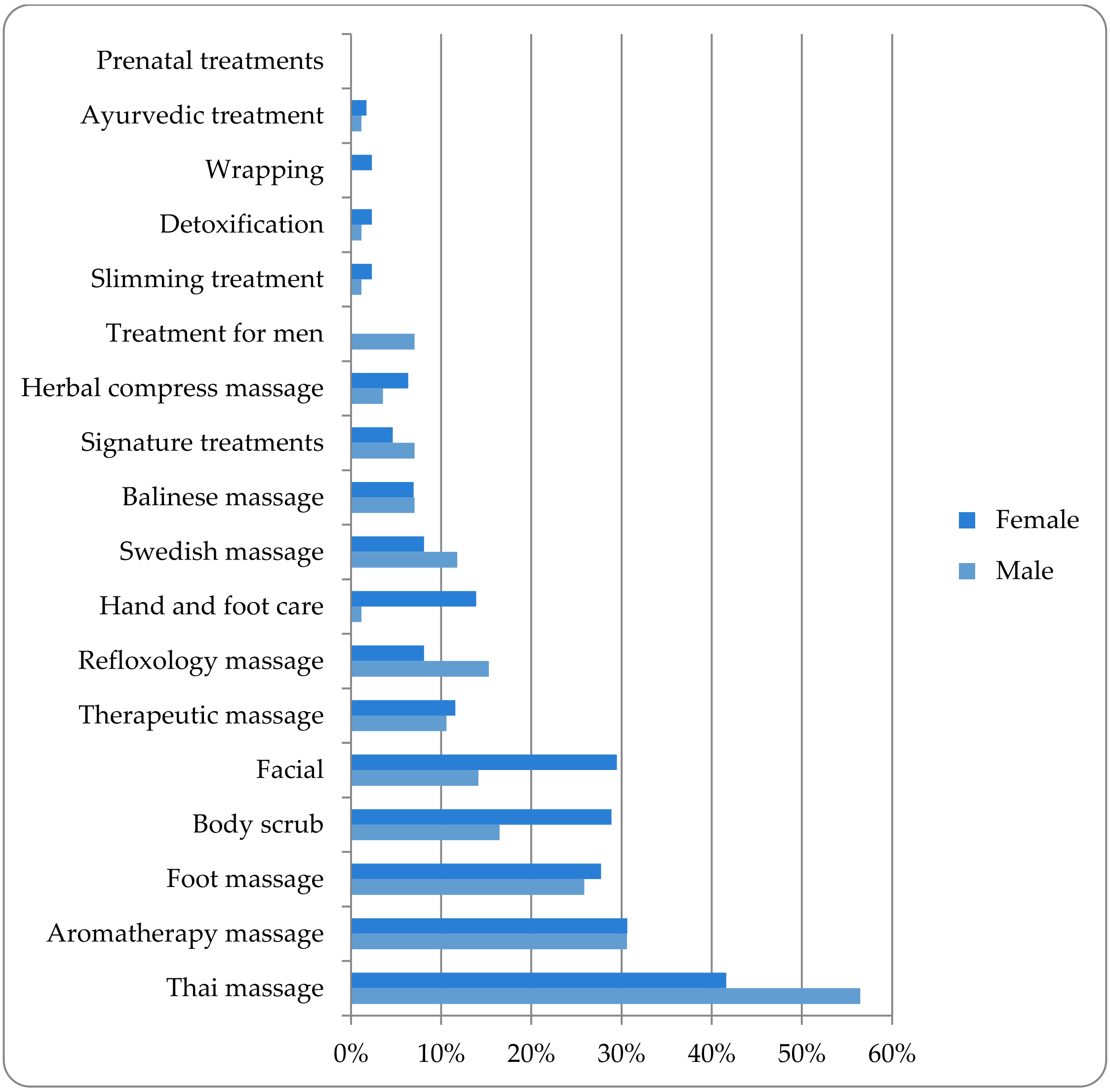
- Most current spa consumers went to a Massage Spa.
- Day Spa, Hotel/Resort spa and Beauty spa were the next 3 most frequented spas.
- Compared to male spa consumers, a significantly higher proportion of female spa consumers visit beauty spa.
- On the other hand, compared to female spa consumers, a slightly higher proportion of male spa consumers visited a Massage spa and Hotel/Resort spa.

Current Vs. Potential Spa Consumers

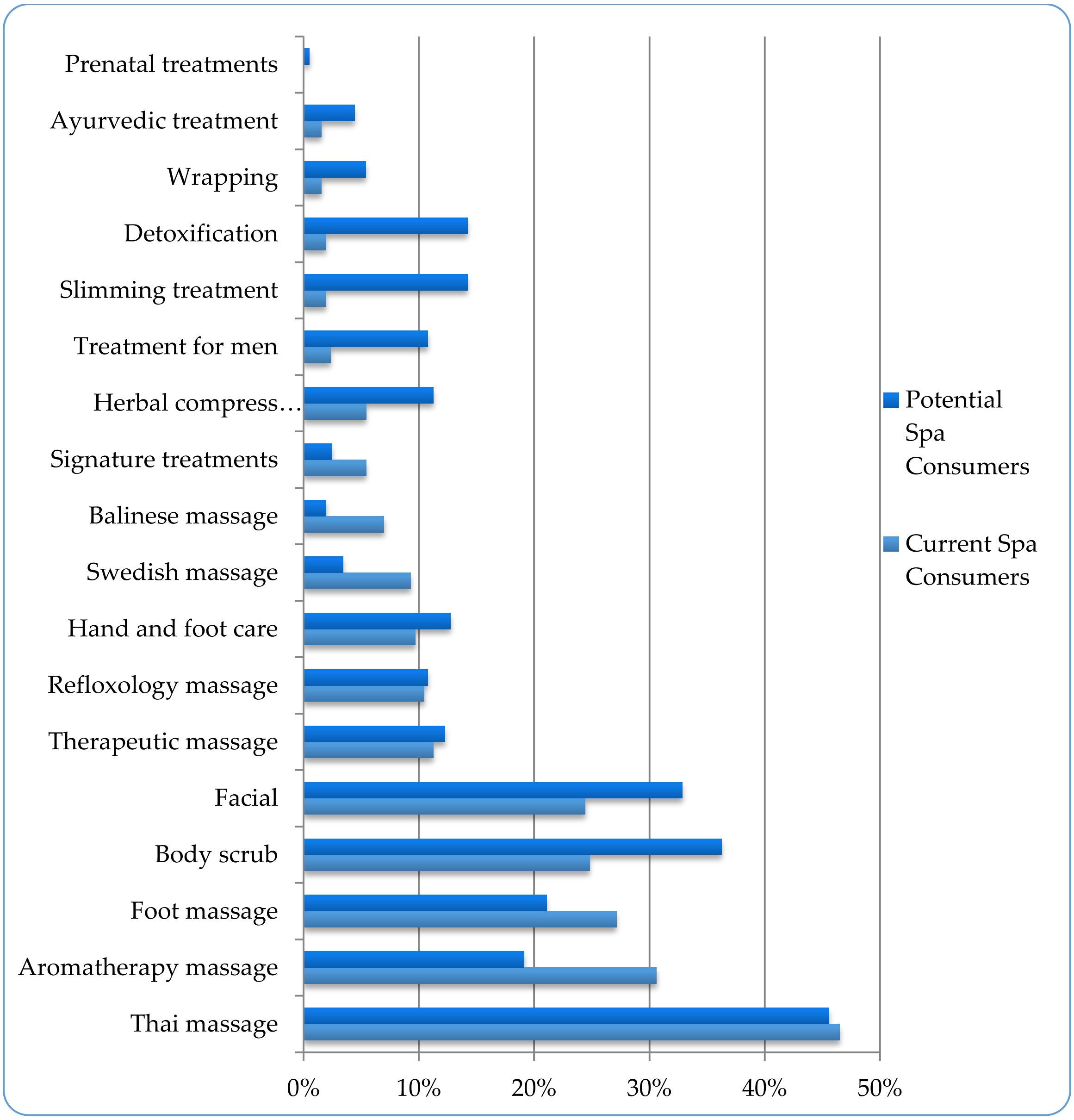


- Most potential spa consumers expect/want to visit a massage spa, beauty spa or a hotel/resort spa.

B2.5 TREATMENTS/THERAPIES CHOSEN MOST OFTEN / INTERESTED IN

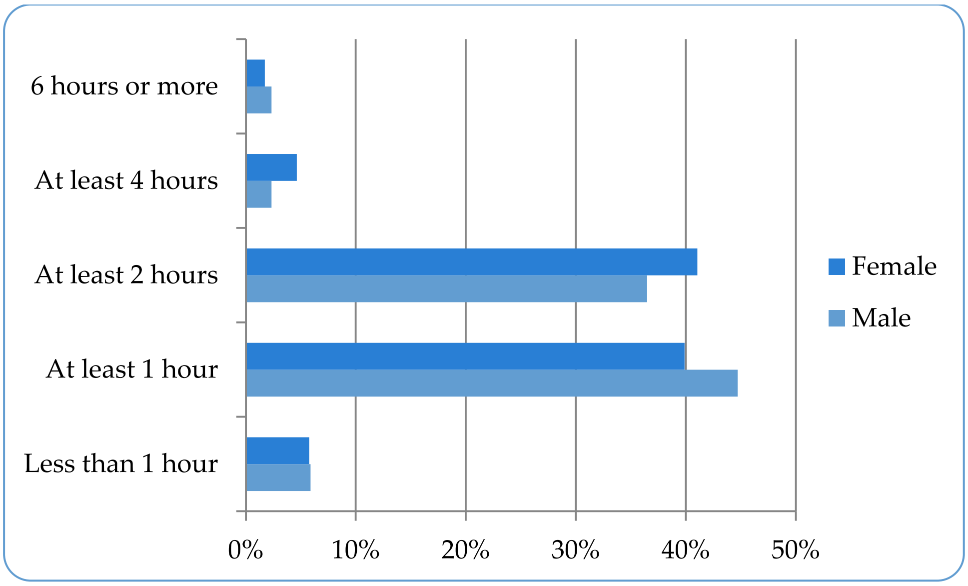


- The spa treatments / therapies can be divided into 3 main groups as follows (based on how often treatments were chosen):
  - Group 1: Thai massage, Aromatherapy massage, Foot massage, Body scrub and Facial.
  - Group 2: Therapeutic massage, Reflexology massage, Hand and foot care, Swedish massage, Balinese massage, Signature treatments and Herbal compress massage
  - Group 3: Treatment for men, Slimming treatment, Detoxification, Wrapping, Ayurvedic treatment and Prenatal treatment
- Proportionally female spa consumers chose to have more Facial, Hand and foot care, Body scrub and herbal compress massage than male spa consumers.
- Proportionally male spa consumers chose to have more Thai massage, Swedish massage and Reflexology massage than female spa consumers.

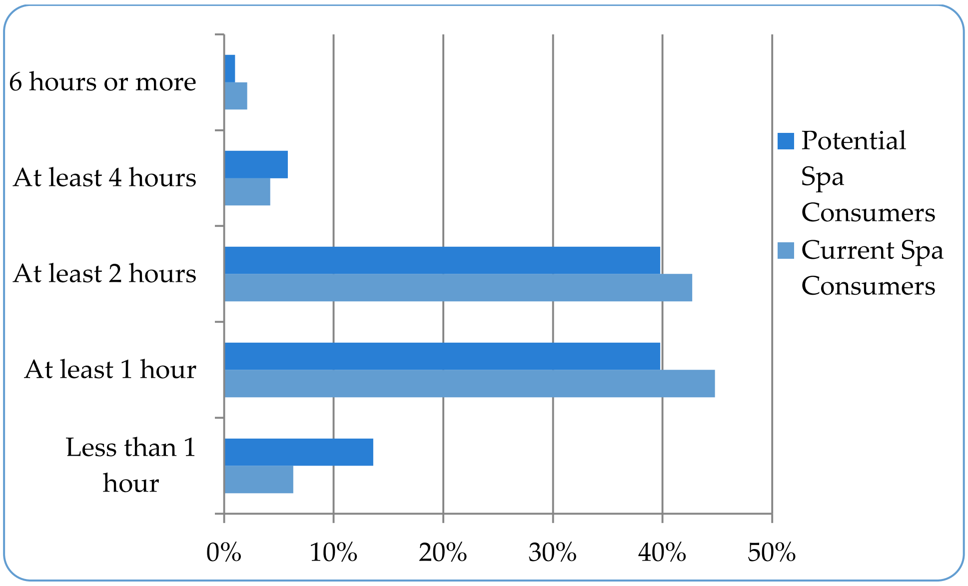


- On comparing spa treatments/therapies that prospective spa consumers seems to have a higher interest in the following treatments/therapies than current spa consumers:
    - Body scrub
    - Facial
    - Detoxification
    - Slimming treatment
    - Treatment for men
    - Herbal compress massage

B2.6 AVERAGE TIME SPENT PER SPA VISIT

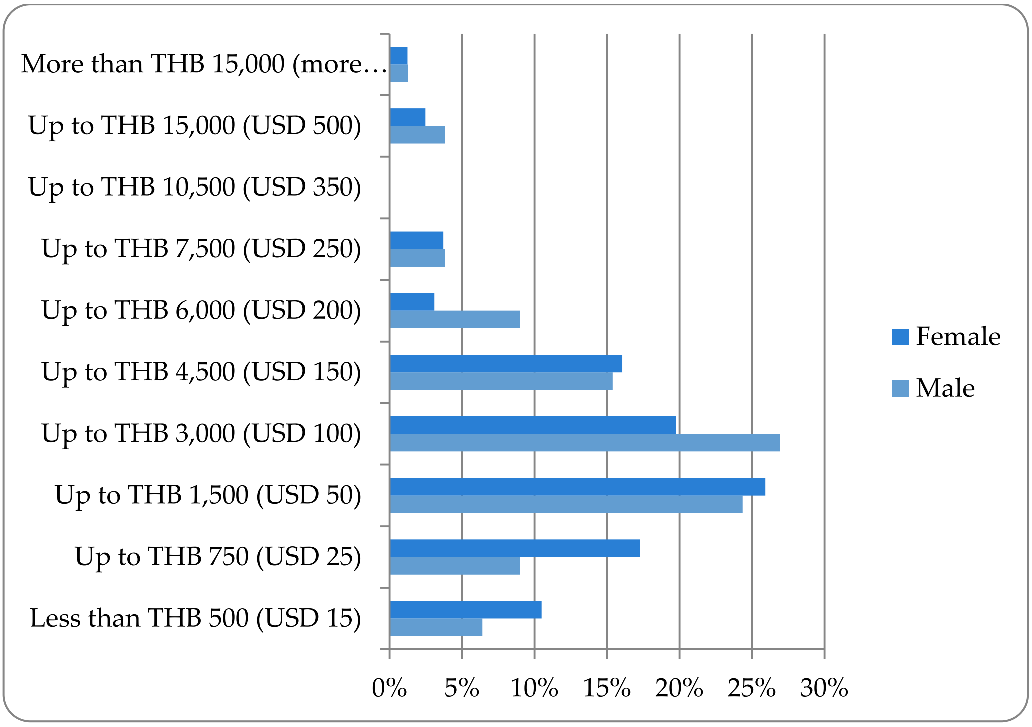


- Almost half of the current spa consumers spent on average at least 2 hours or more at the spa
- 45 % of current spa consumers spent at least 1 hour at the Spa
- Proportionally female spa consumers spent on average slightly more time at the spa.



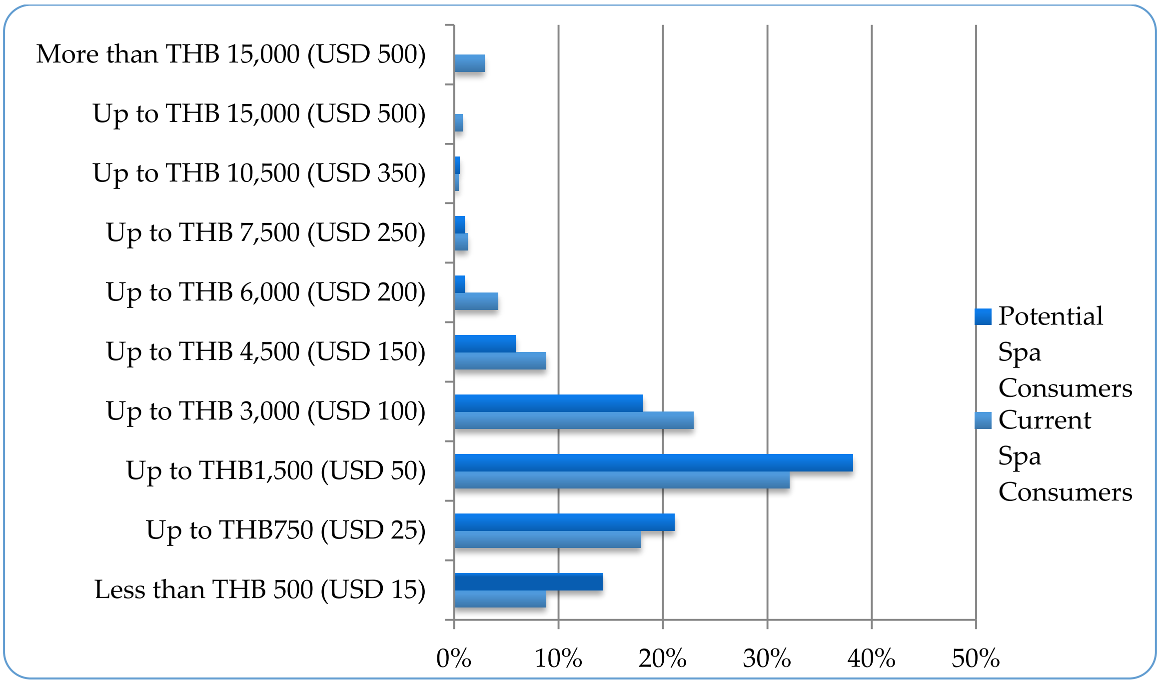
- Proportionally, the potential spa consumer expects to spend slightly less time at the spa than current spa consumers.

B2.7 AVERAGE SPENDING PER SPA VISIT



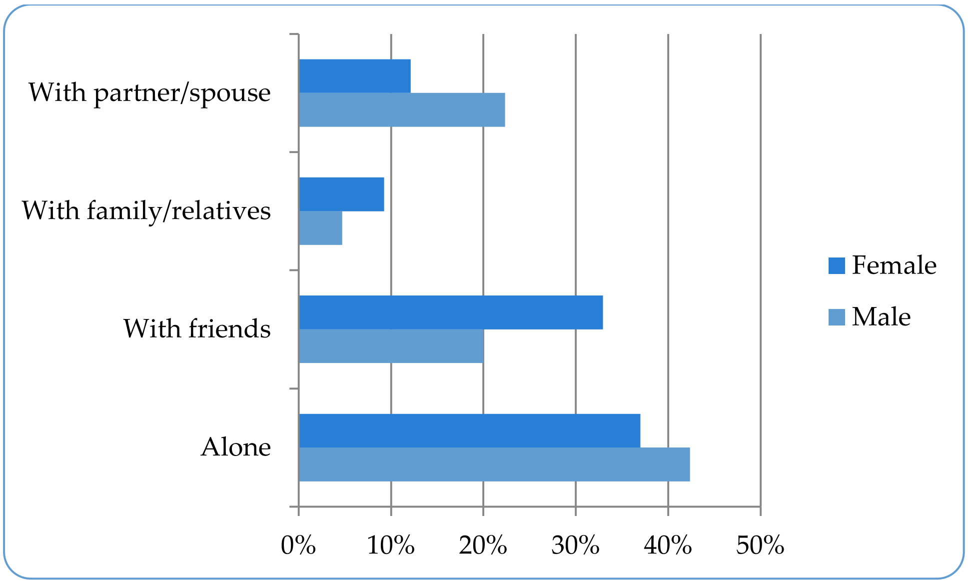
- 18% of current spa consumers spent THB 3,000 (USD 100) or more on average per spa visit
- 15% of current spa consumers spent between THB 1,500 – 3,000 (USD 50 – 100) on average per spa visit
- For an average spending of THB 1,500 (USD 50) or more, proportionally male spa consumers spent slight higher than female spa consumers. This can be explained due to the fact that proportionally male spa consumers are slightly older than the female spa consumers, and might have a higher disposable income.

Potential Vs Current Spa Consumers

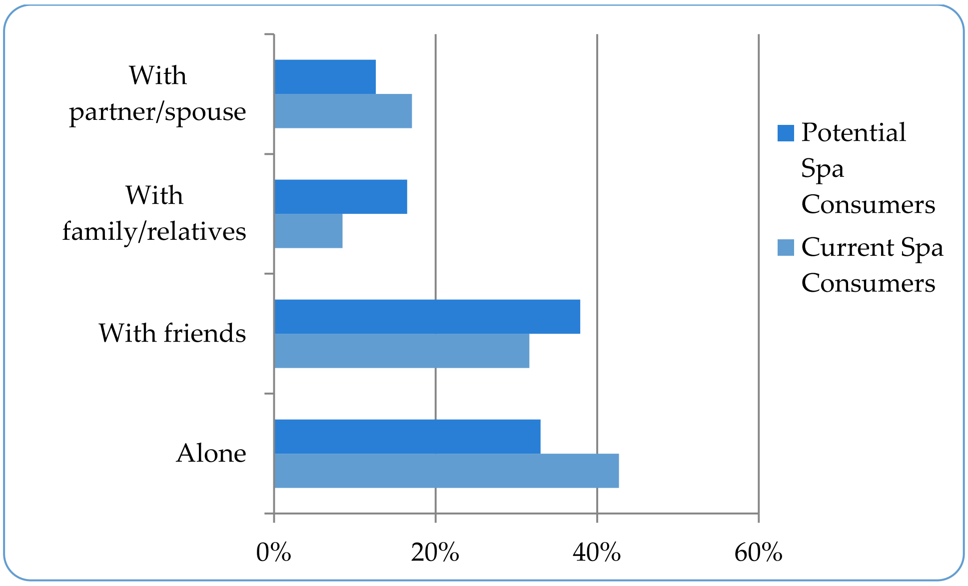


- For an average spending of higher then THB 1,500 (USD 50), proportionally, the potential spa consumer expects to spend slightly less than current spa consumers.
- For average spending of up to THB 1,500 (USD 50), proportionally, there is no difference between potential and current spa consumers.

B2.8 ACCOMPANY FOR SPA VISIT

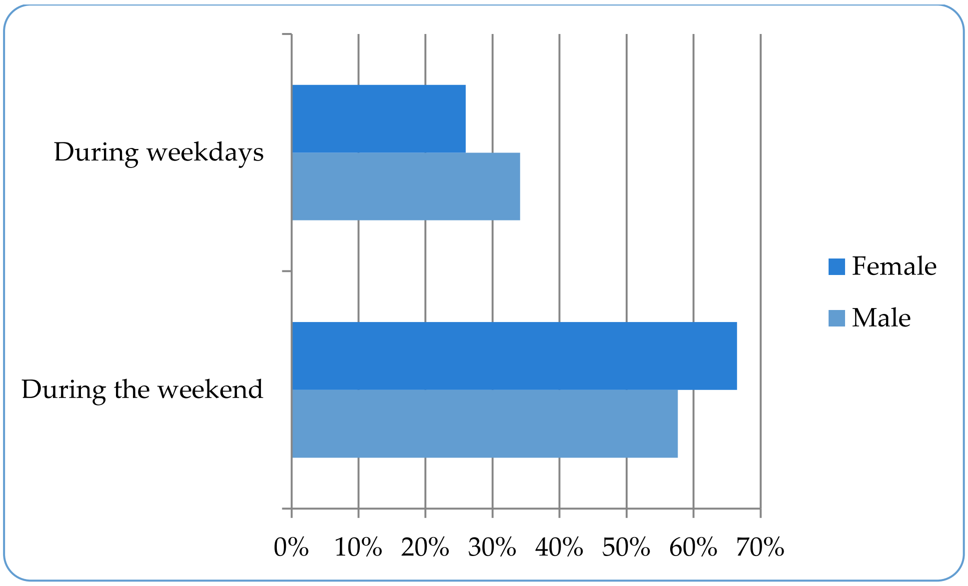


- Majority of current spa consumers went to the spa alone or with friends. This reflects the higher percentage of unmarried respondents.
- A higher proportion of male spa consumers visit the spa with their spouse or partner. This is in sync with the fact a higher proportion of male survey respondents are married or living with their partners.

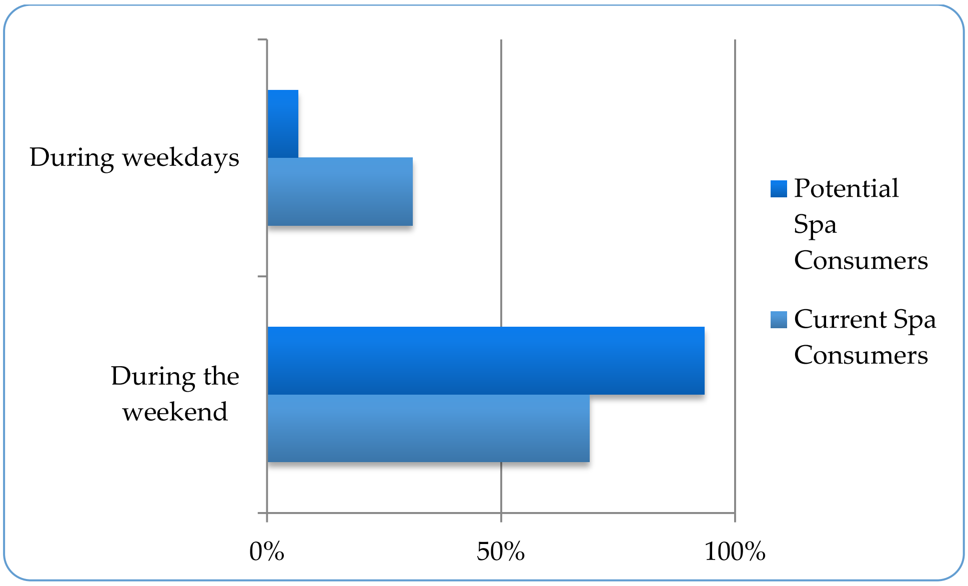


- Compared to current spa consumers, a higher proportion of potential spa consumers expect to visit the spa with their friends or family and relatives.

B2.9 DAY OF SPA VISIT

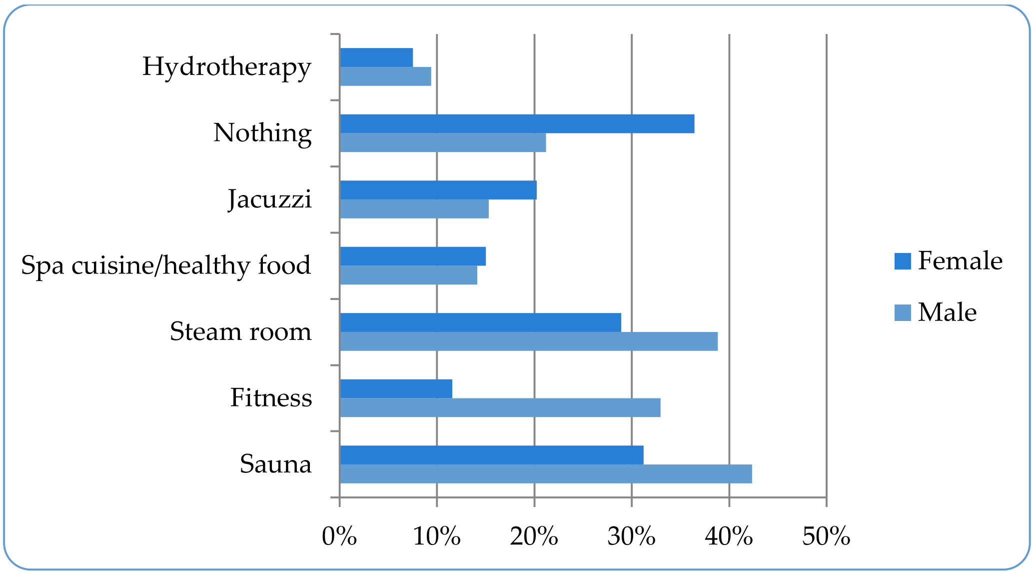


- Currently most spa consumers visit the spa during the weekend. A sizeable number do visit the spa during the weekdays. From the Focus groups and interviews it was seen that some spa customers go to the spa after office hours.
- Proportionally, more male spa consumers visit the spa during weekdays than female spa consumers; whereas the opposite is true for spa visits on the weekend.

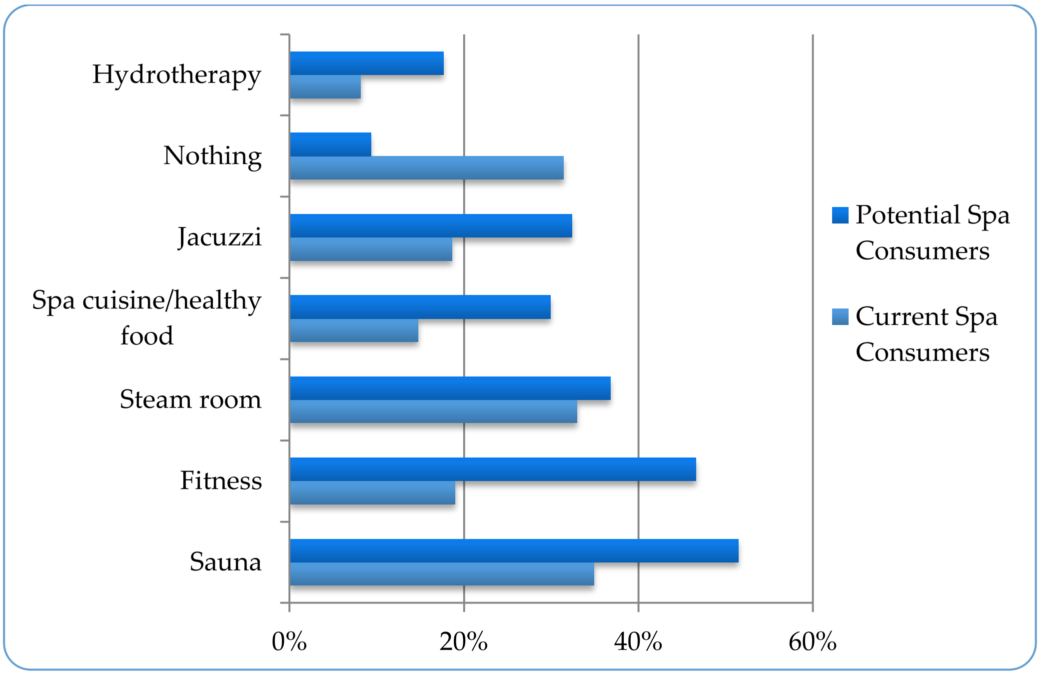


- Compared to current spa consumers, a higher proportion of potential spa consumers expect to visit the spa during the weekend.

B2.10 OTHER FACILITIES USED DURING SPA VISIT

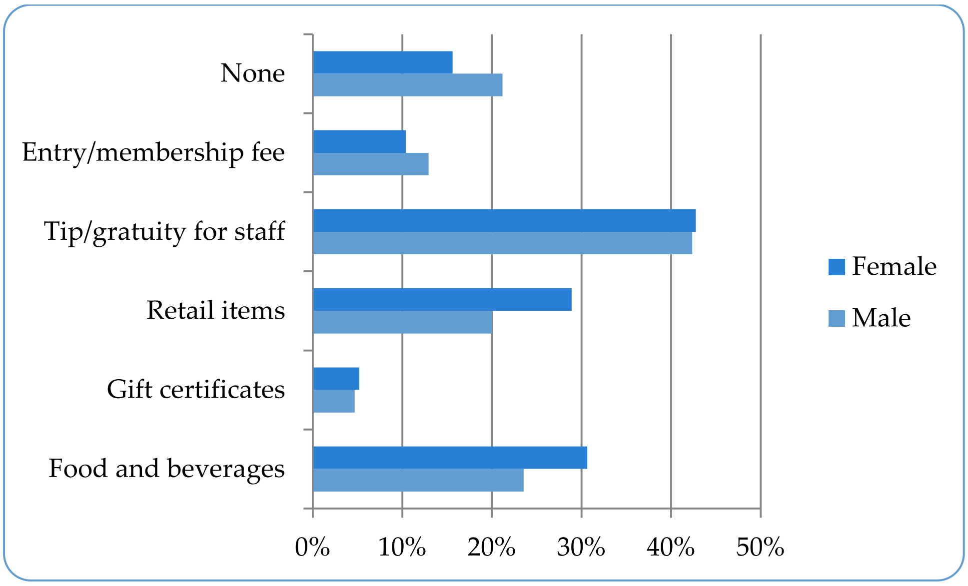


- 21% of male and 36% of female spa consumers have stated that apart frpom spa treatments, they won't use any other facilities in a spa.
- Apart from spa treatments, sauna and steam room are the most common facilities that current spa consumers use.
- Proportionally, male spa consumers used more sauna, fitness and steam room facilities than female spa consumers. Female spa consumers used Jacuzzi more than male spa consumers.

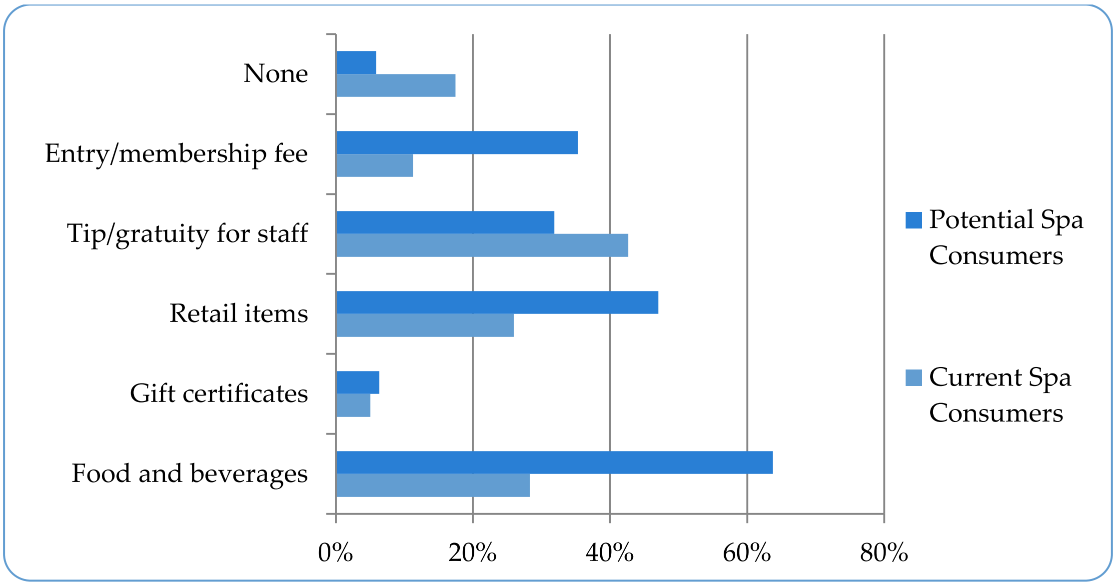


- The potential spa consumers are bit more enthusiastic about using available facilities. Compared to potential spa consumers, the current spa consumers seems to have a pragmatic approach when it comes to using other facilities in the spa.

B2.11 ITEMS MONEY SPENT ON

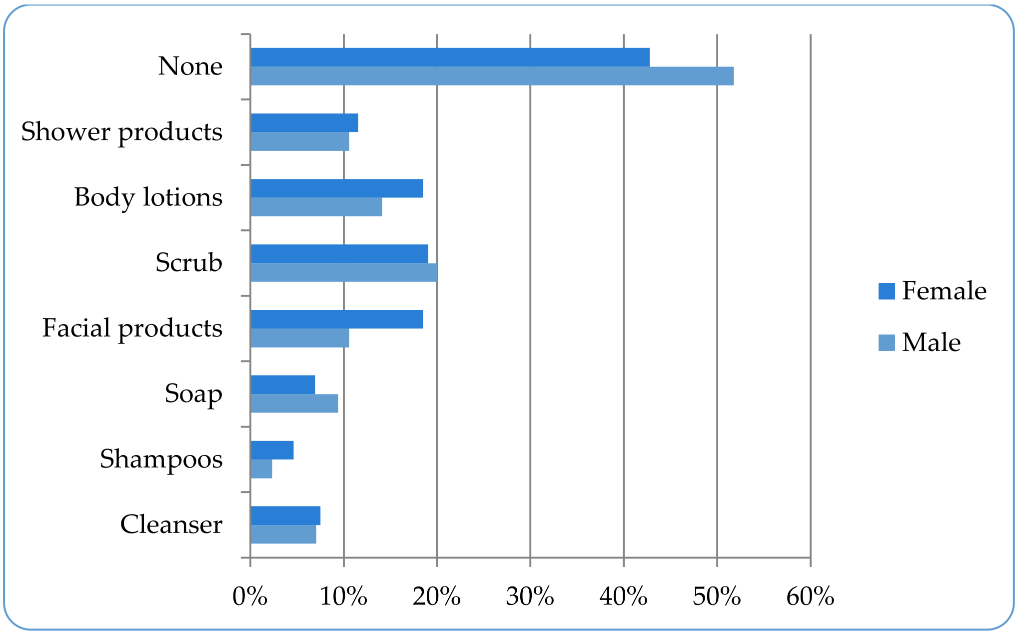


- Apart from spa treatments, current spa consumers spent money mostly on tip/gratuity to staff. This was followed by spending on food and beverages and on retail items.
- Proportionally, female spa consumers spent slightly higher on retail items and food and beverages than male spa consumers.

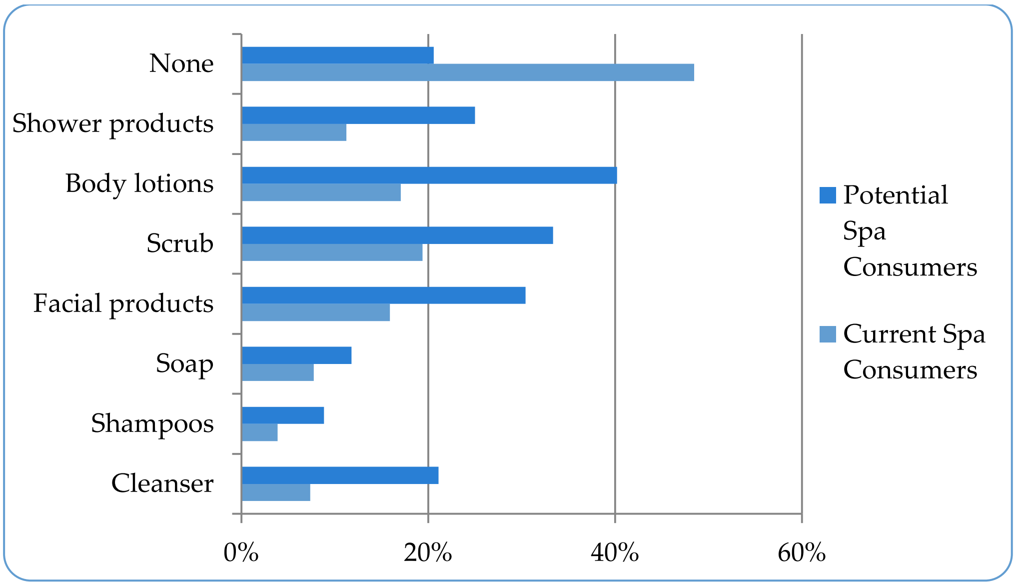


- Proportionally, the potential spa consumer expects to spend more money on food and beverages, retail items and entry/membership fees, than current spa consumers.

B2.12 RETAIL ITEMS PURCHASED

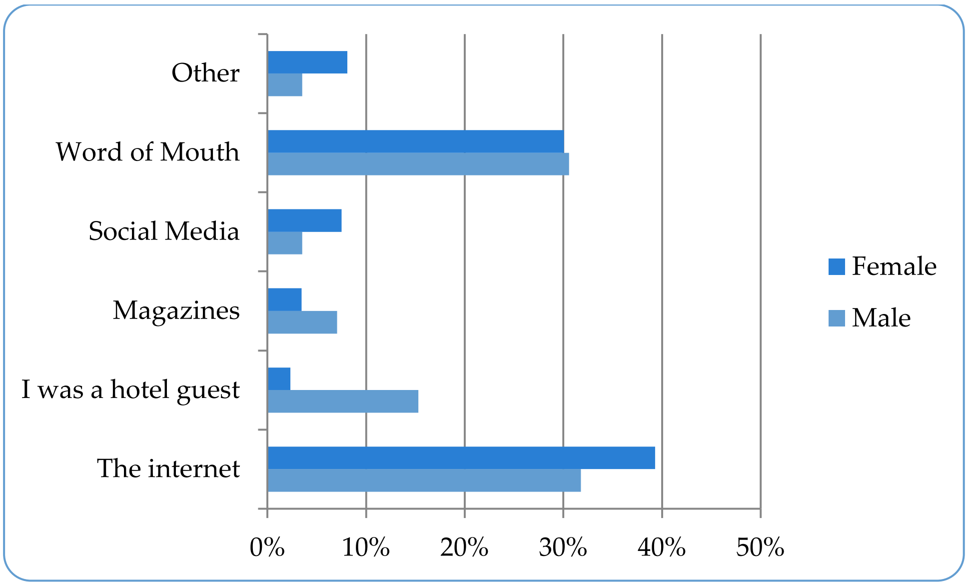


- Almost half of current spa consumers do not purchase any retail items.
- Scrub, body lotion and facial product are the most common retail items purchased.
- Proportionally, female spa consumers purchased more facial products and body lotions than male spa consumers.

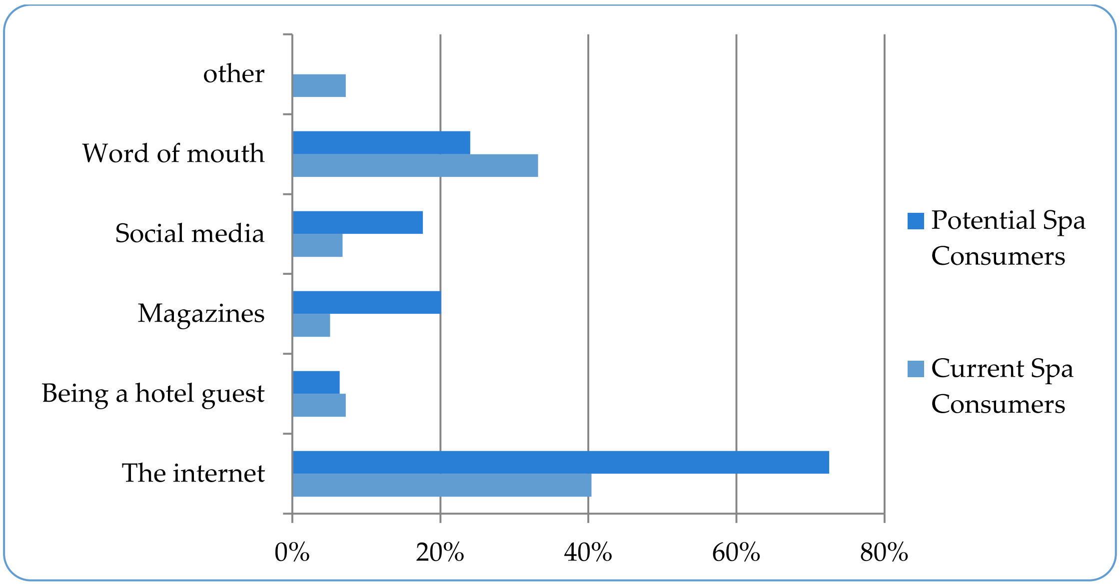


- The potential spa consumers are bit more enthusiastic in terms of purchasing retail products during a spa visit. Compared to potential spa consumers, the current spa consumers seem to have a pragmatic approach when it comes to buying retail products during spa visits.

B2.13 HOW TO SEARCH FOR SPA



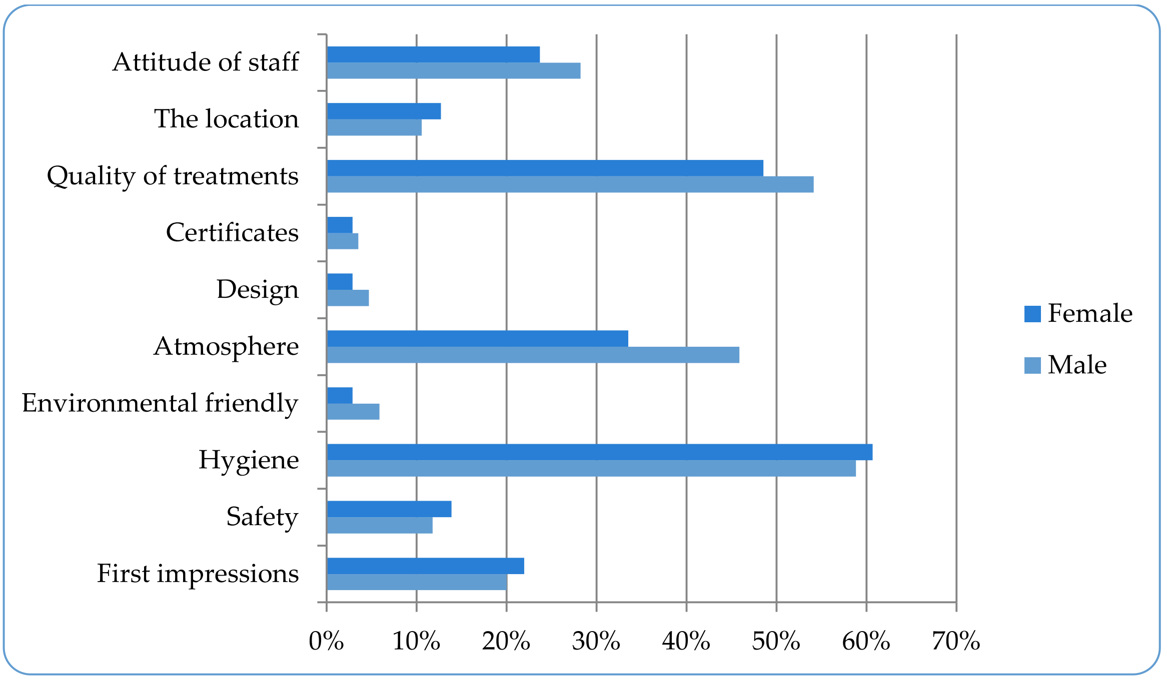
- *Internet* and *word of mouth* were 2 main approaches for current spa consumers to search for a spa.
- A significantly higher proportion of male spa consumers *chose a spa during their hotel stay* than female spa consumers.



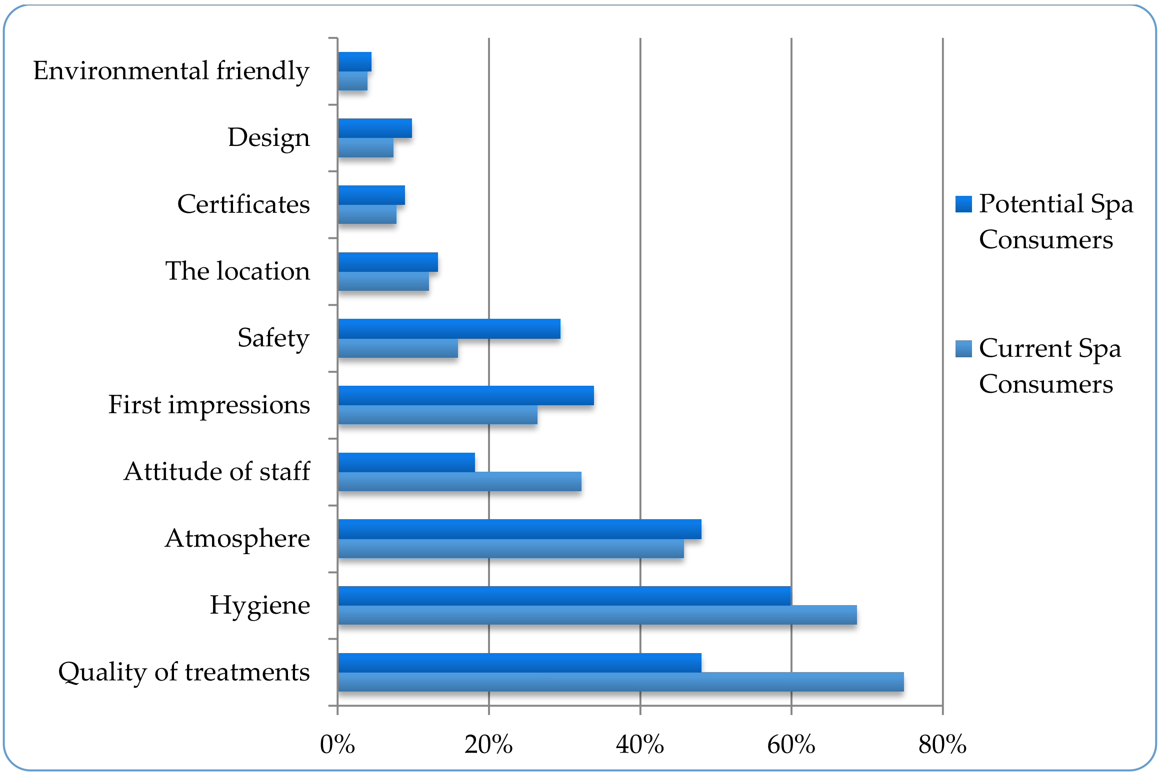
- For potential spa consumers, *Internet* and *word of mouth* remain very important methods to search for a spa, but *social media* and *magazines* assume higher importance as well, when compared to how current spa customers search for a spa.

B3. OPINION ON SPA AND SPA PRODUCTS

B3.1 MOST IMPORTANT FACTOR WHEN VISITING A SPA

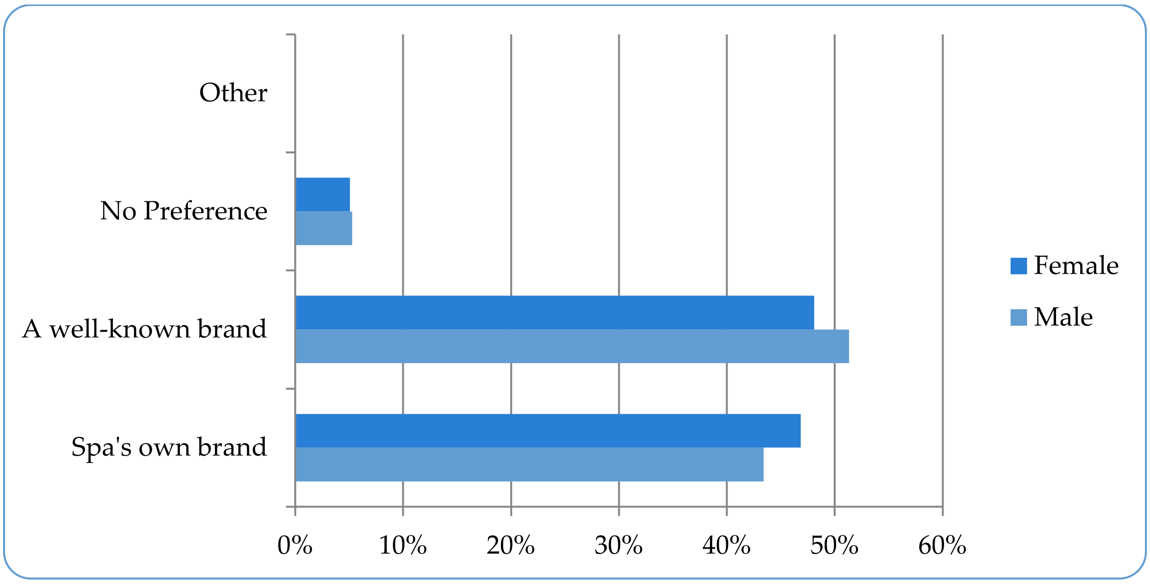


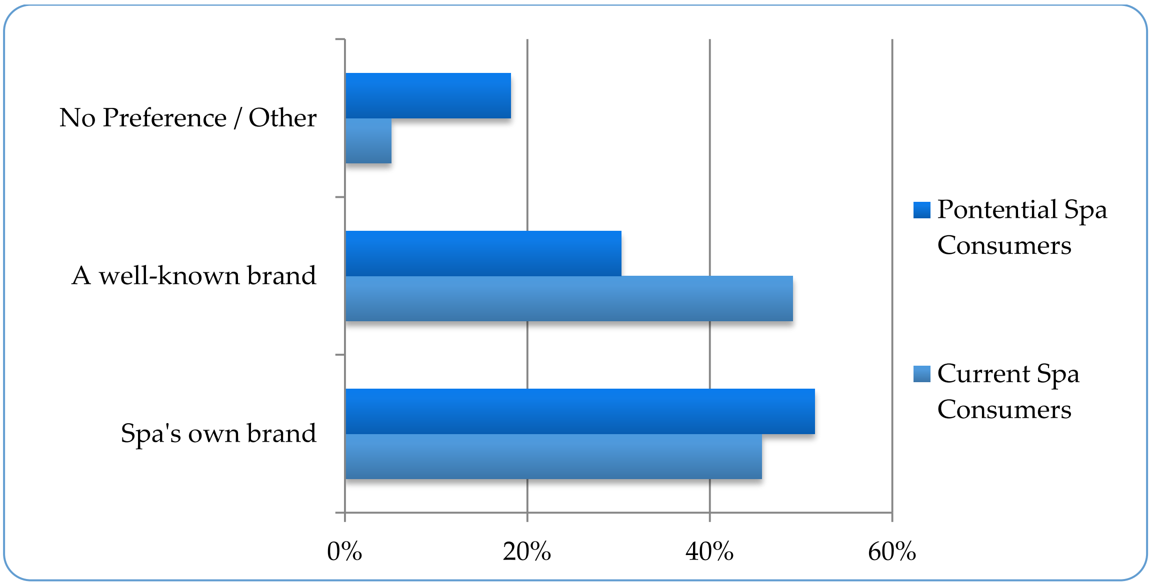
- For male as well as female current spa consumers, *quality of treatment*, *hygiene* and *atmosphere* were the 3 main important factors when visiting a spa.
- Male spa consumers pay higher emphasis on *atmosphere* than female spa consumers.



- For current spa consumers, when visiting a spa, *quality of treatment*, *hygiene* and *atmosphere* were the 3 main important factors. Potential spa consumers cited the same 3 factors as the most important.
- *Quality of treatment* was more frequently selected by current spa consumers than potential spa consumers as an important factor when visiting a spa; whereas, *safety* and *first impressions* were more frequently selected by potential spa consumers than potential spa consumers as an important factor when visiting a spa.

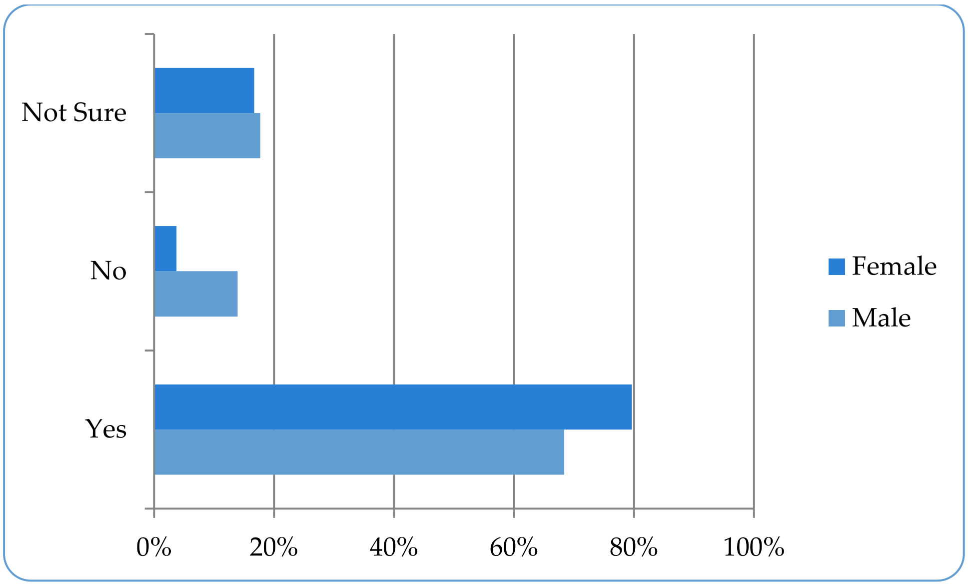
B3.2 PREFERENCE FOR SPA PRODUCT BRANDS



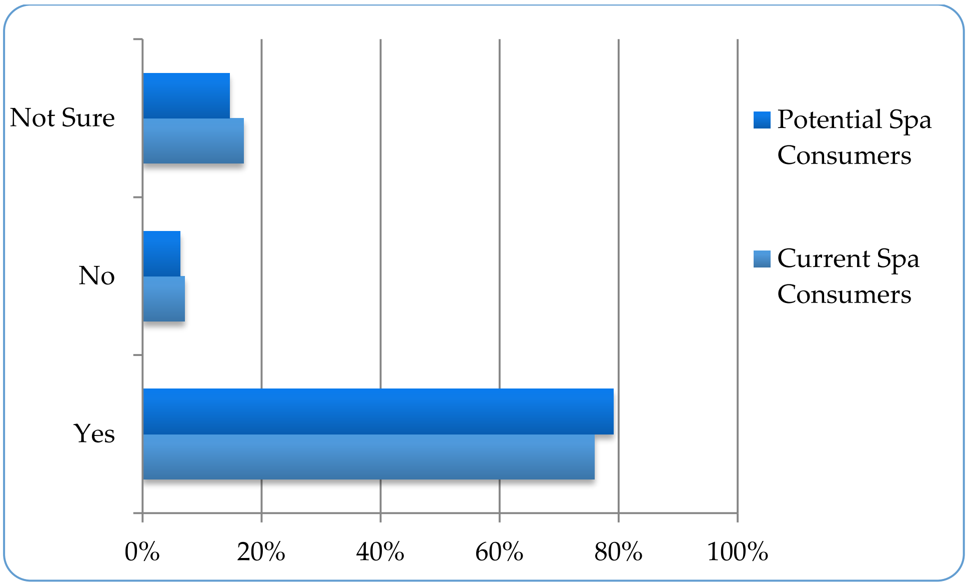


- For current spa consumers, there was almost an equal preference for spas own brand or a well-known brand.
- Current spa consumers had a higher preference for a well-known brand than potential spa consumers.

B3.3 PREFERENCE FOR ORGANIC PRODUCTS



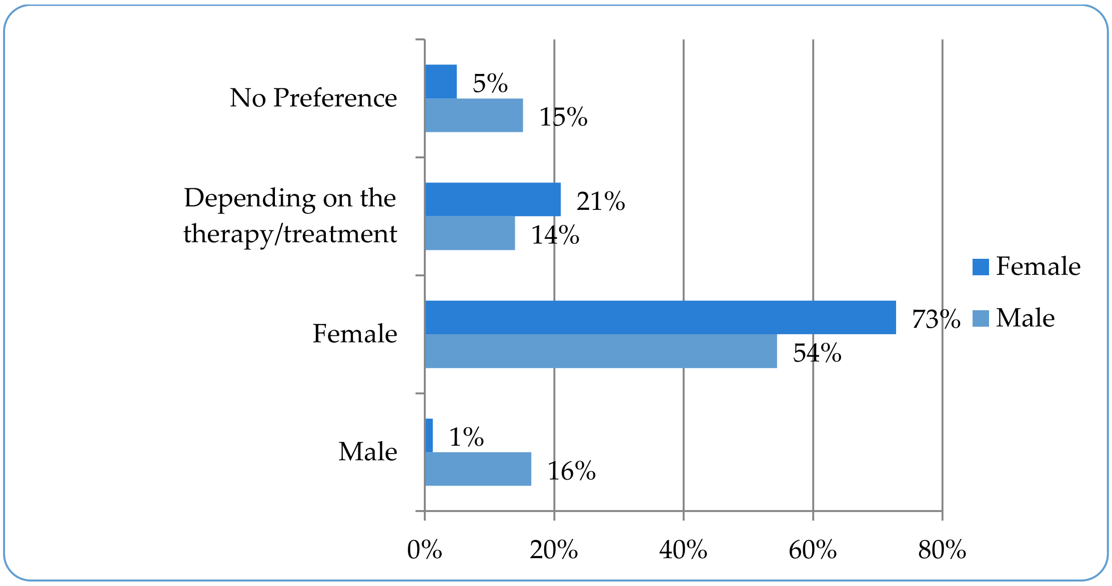
- Current female spa consumers had a slightly higher preference for organic products than male consumers.



- Not much difference was found between current spa consumers and potential spa consumers when it comes to the use of organic products in spa. Most consumers prefer the use of organic products.

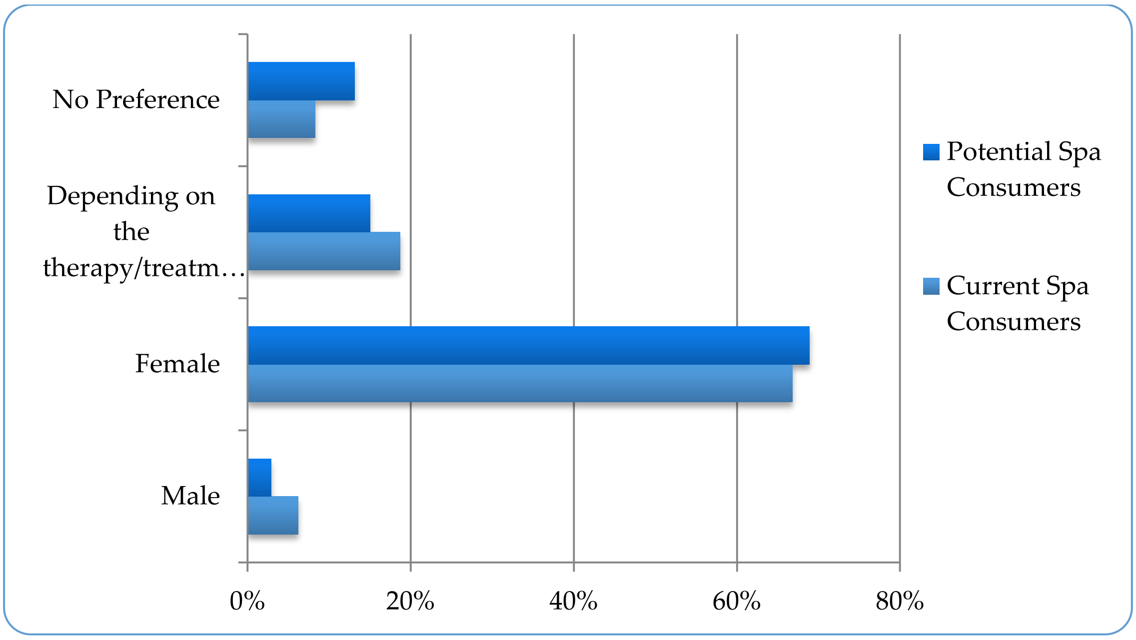
B4. OPINION ON THERAPISTS

B4.1 PREFERENCE FOR MALE OR FEMALE THERAPISTS



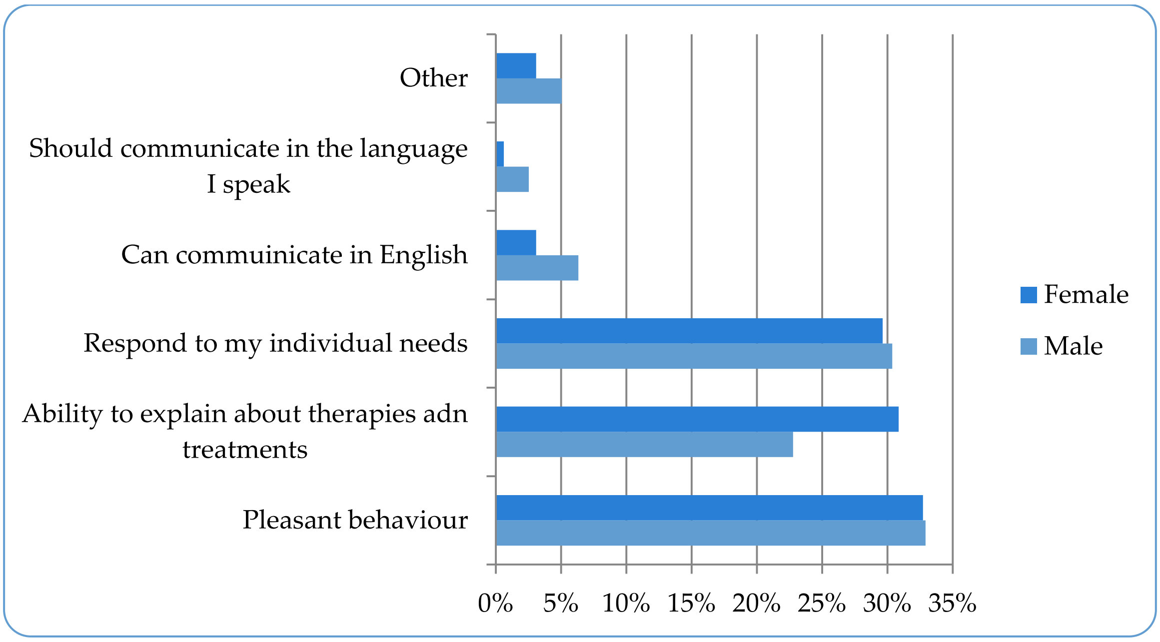
- Most current female spa consumers prefer either female therapists or someone depending upon the therapy or treatment.
- Although quite a large proportion of male spa consumers prefer female therapists or someone depending upon the therapy or treatment, almost 16% prefer a male therapist.

Current Vs.Potential Spa Consumers



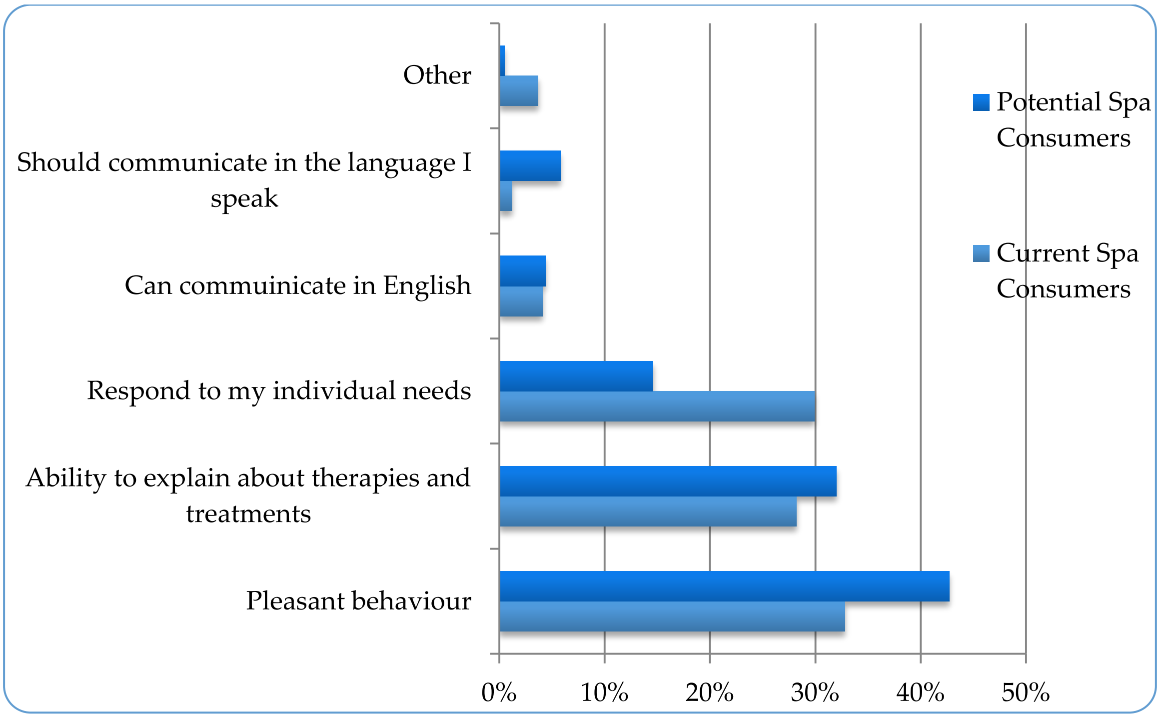
- Not much difference was found between current spa consumers and potential spa consumers on their preference for male or female therapists.
- Most consumers seem to have a preference for female therapists
- A slightly higher proportion of current spa consumers than potential spa consumers seem to prefer a male or female therapist depending on the therapy or treatment.

B4.2 MOST IMPORTANT CHARACTERISTIC'S FOR THERAPISTS



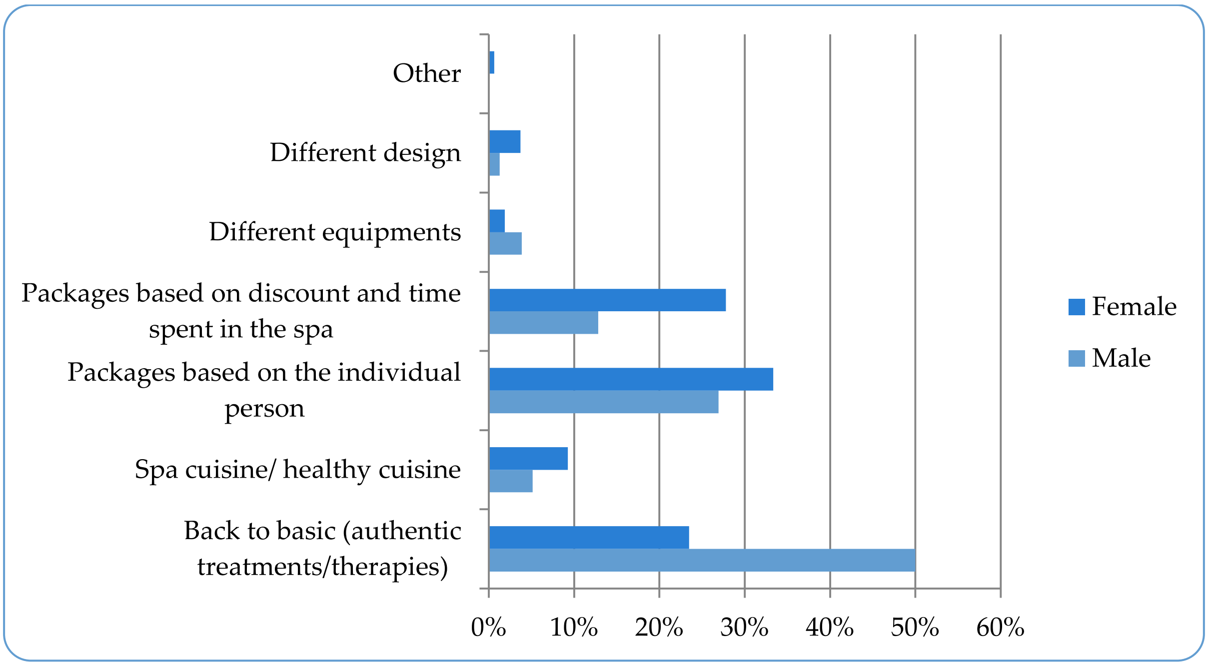
- For current spa consumers, the top 3 important characteristics of therapists are *pleasant behaviour, responding to individual needs* and *ability to explain therapies and treatments*.

Current Vs. Potential Spa Consumers



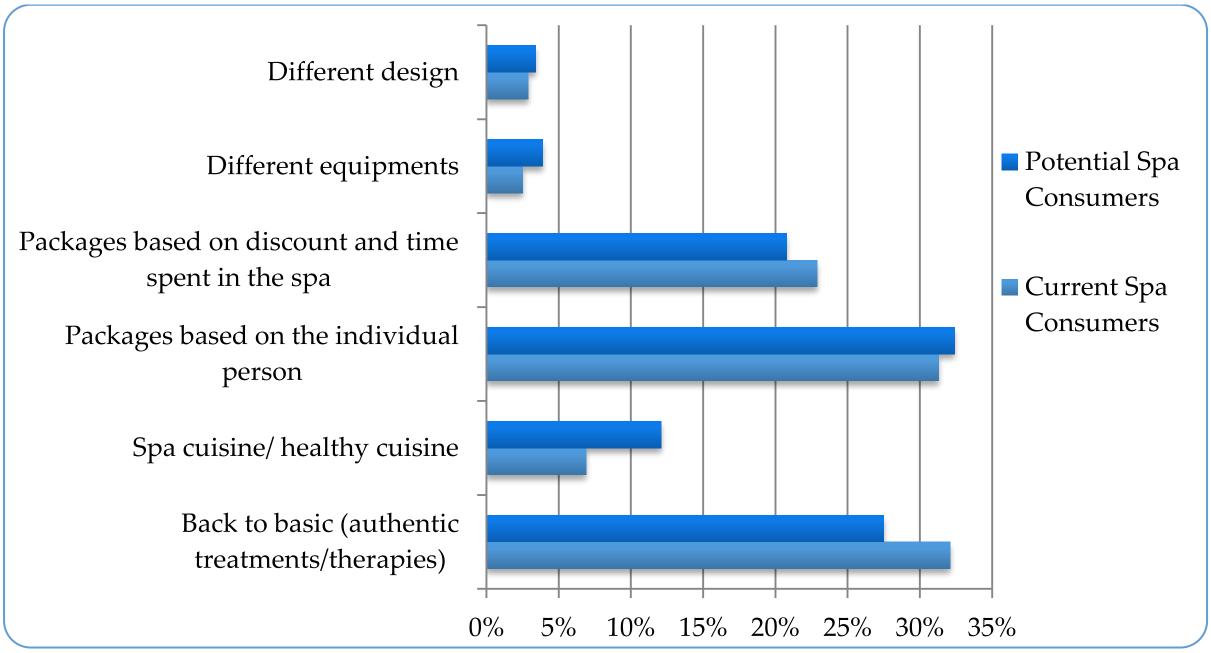
- The top 3 important characteristics of therapists for both current and potential spa consumers are *pleasant behaviour*, *responding to individual needs* and *ability to explain therapies and treatments*.
- When comparing the opinion of current spa consumers and potential spa consumer, it can be seen that *pleasant behaviour* is more important to potential spa consumers, whereas *responding to individual needs* seems to be more important to current spa consumers.

B5. FUTURE EXPECTATIONS



- The top 3 future expectations of the current spa consumers are authentic treatments/therapies, packages based on either *discount and time spent in the spa* and *individual persons*.
- When comparing the opinion of current male and female spa consumers, it can be seen that *authentic treatments/therapies* is more important to male spa consumers, whereas packages based on packages based on *discount and time spent in the spa* and *individual persons* seems to be more important to female spa consumers.

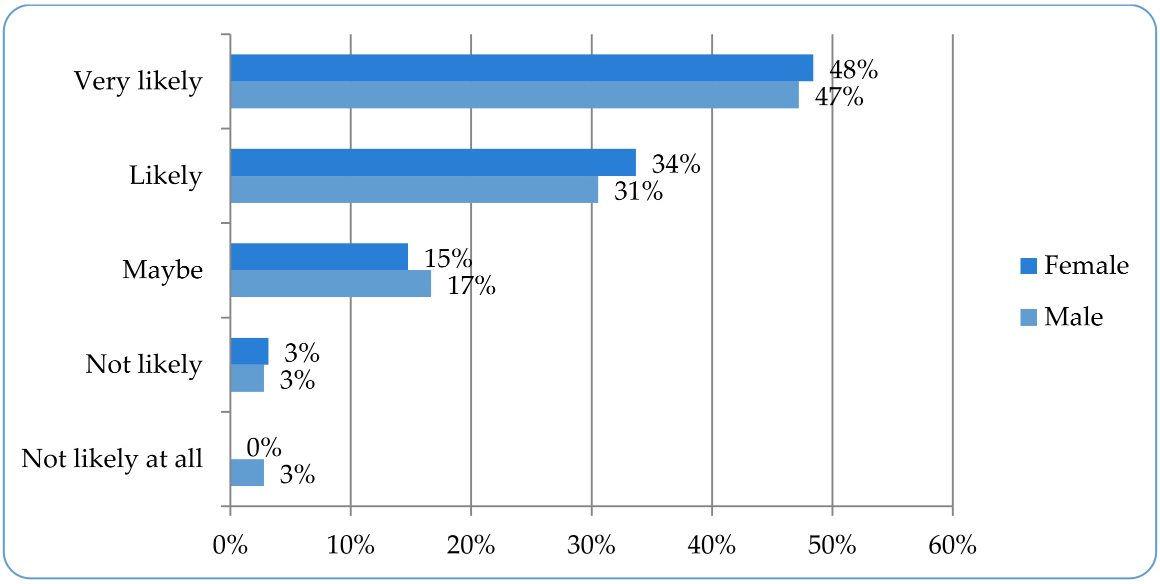
Current Vs Potential Spa Consumers



- The top 3 future expectations of the potential spa consumers are the same as current spa consumers: authentic treatments/therapies, packages based on either *discount or time spent in the spa*, and *individual persons*.
- Potential spa consumers would also in the future like to see more spa cuisine/healthy cuisine in spas.

B6. FUTURE SPA VISITS

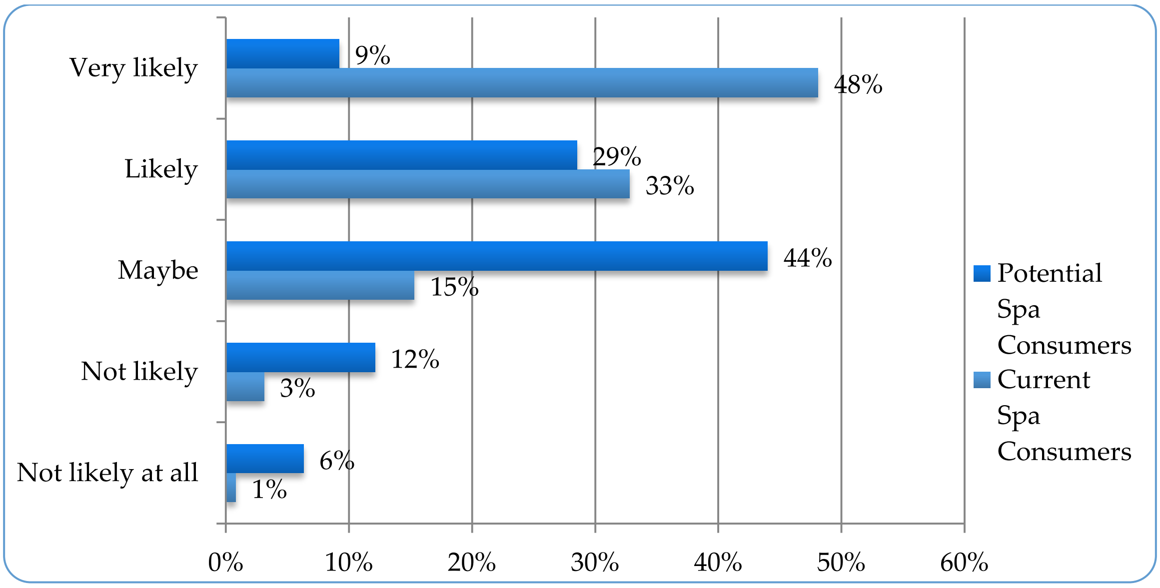
B6.1 LIKELIHOOD OF FUTURE SPA VISITS



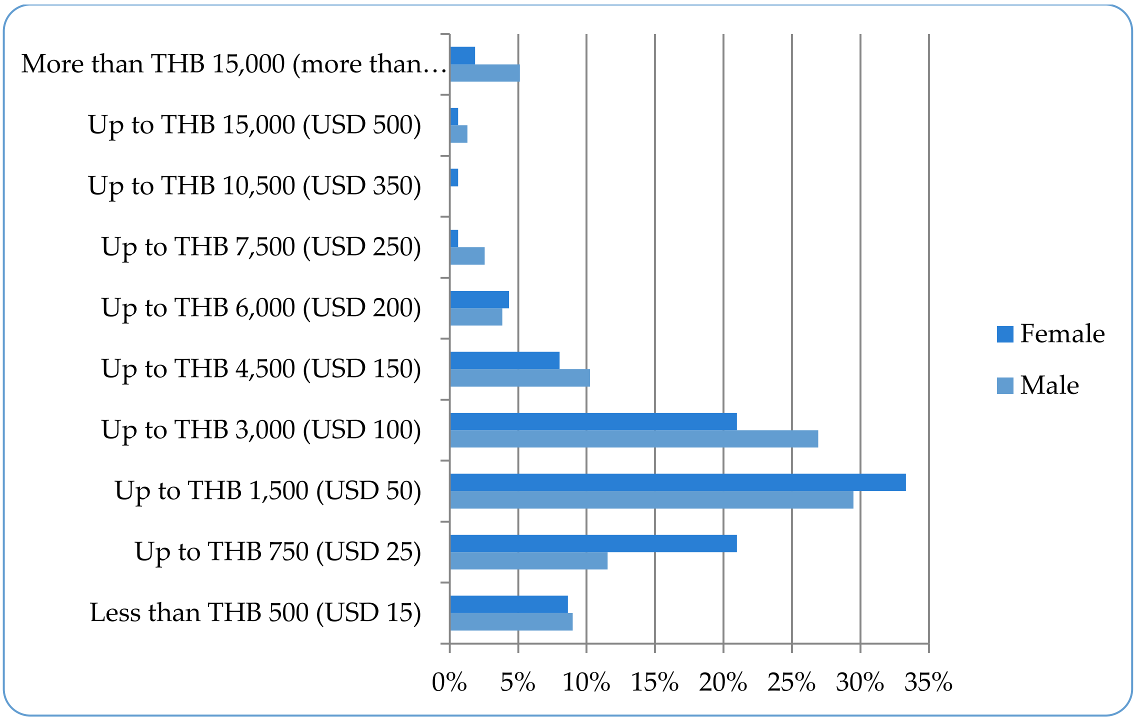
- Almost 80% of current spa consumers are likely or very likely to visit a spa in the next 12 months.
- There is no significant difference between current male or female spa consumers in terms of their likelihood to visit a spa in the next 12 months.

<u>Current Vs. Potential Spa Consumers</u>

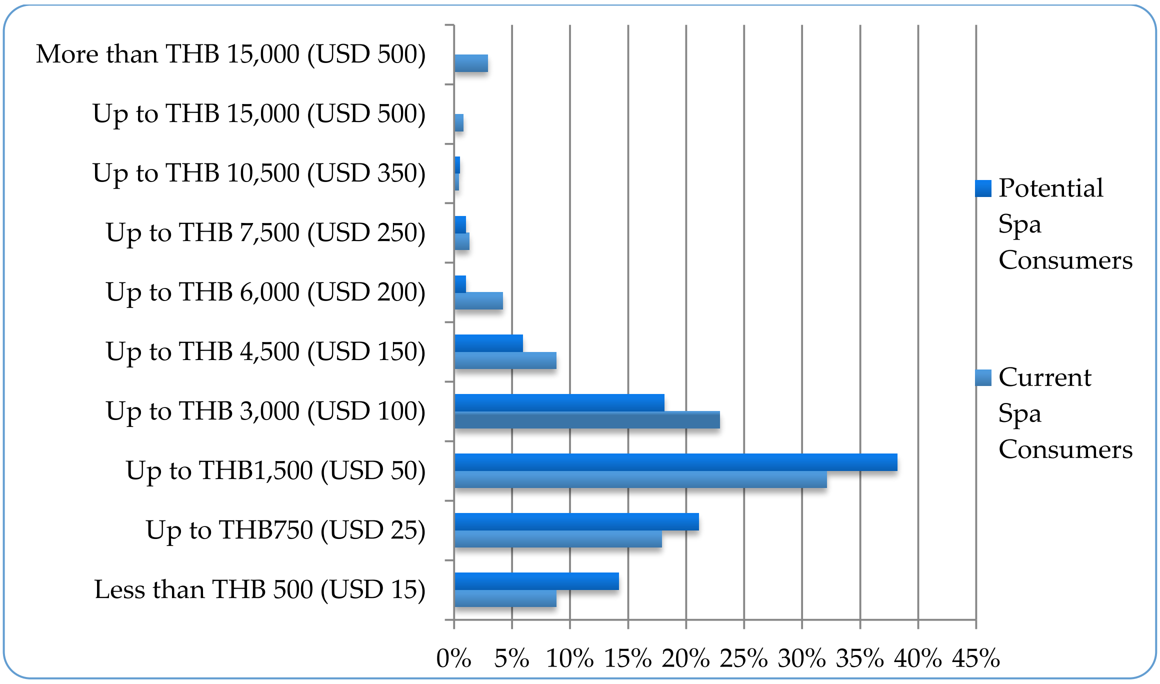
- As expected current spa consumers are more likely to visit a spa in the next 12 months than potential spa consumers
- 38% of potential spa consumers are likely or very likely to visit a in the next 12 months.



B6.2 FUTURE AVERAGE SPENDING PER SPA VISIT

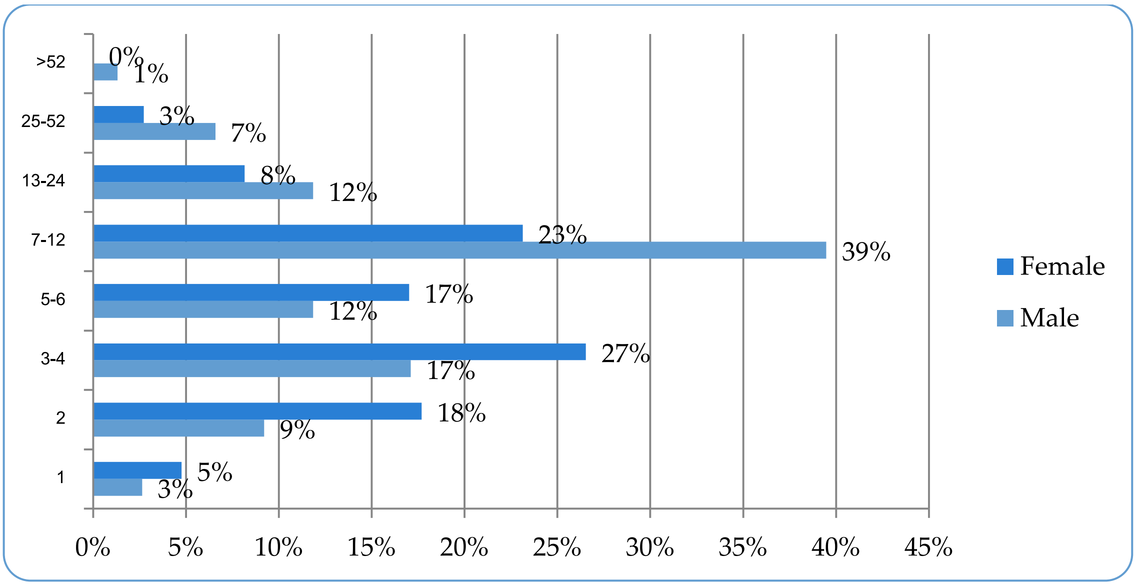


- In terms of proportion, male current spa consumers are expected to spend slightly more during a future spa visit, than female current spa consumers (especially for average spending of more than THB 1,500 / USD 50).

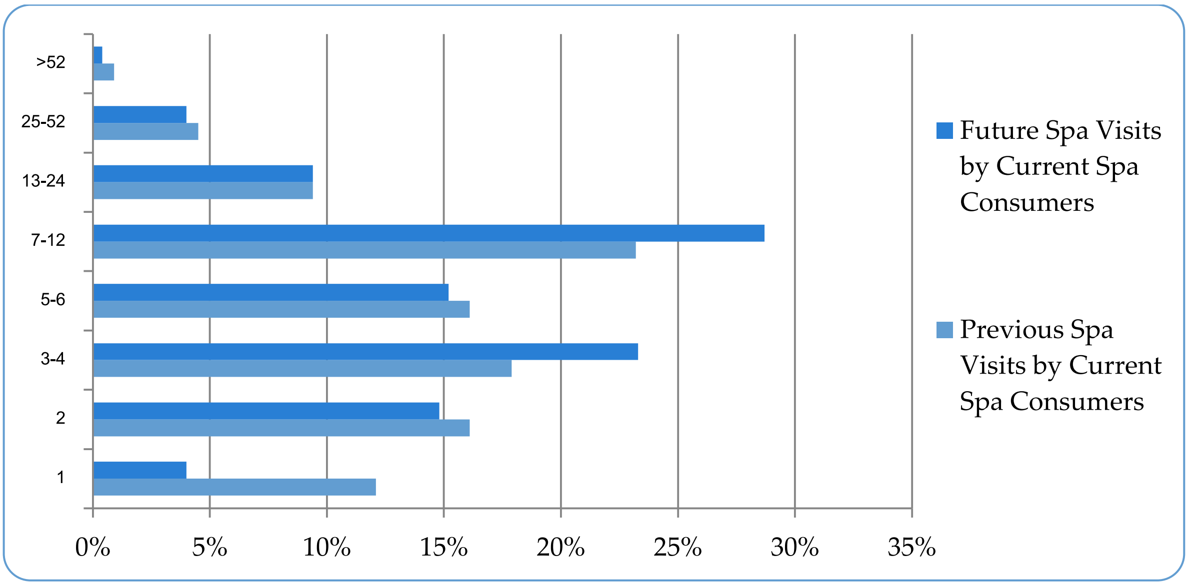


- As expected current spa consumers are expected to spend more during a future spa visit, than potential spa consumers

B6.3 FORECAST SPA VISIT FOR THE NEXT 12 MONTHS



- In terms of proportion, it seems that current male spa consumers would visit the spa in the next 12 months, more frequently than current female spa consumers.
- 20% of current male spa consumers would visit the spa atleast once a month, whereas 11% of current female spa consumers will do the same.
- 39% of current male spa consumers would visit the spa between once in 2 months to every month, whereas 23% of current female spa consumers will do the same.



- Compared to spa visits in the past 12 months, current spa consumers are expected to go more often to the spa in the next 12 months.

B7. IMPORTANT OBSERVATIONS

Respondent Demographics

- 73% of the survey respondents were residing in Thailand, although only 62% of our survey respondents were actually Thai Citizens
- The sample had a slight bias towards single females, but this is concurrent with the higher number of younger females in the sample.
- 56% of total survey respondents have visited a spa in the last 12 months.
- Almost half of non-spa consumers (potential spa consumers) cited not having enough time as the primary reason for not visiting a spa.

Spa Visit Characteristics

- 39% of current spa visitors went to the spa between once in 2 months and once a month
- Majority of current spa consumers went to the spa for relaxation
- Beautification, maintaining a healthy lifestyle and rewarding / spoiling oneself were the next 3 most commonly cited reasons for visiting a spa
- Most current spa consumers went to a Massage Spa. Day Spa, Hotel/Resort spa and Beauty spa were the next 3 most frequented types of spa.
- Proportionally female spa consumers chose to have more Facial, Hand and foot care, Body scrub and herbal compress massage than male spa consumers.
- Proportionally male spa consumers chose to have more Thai massage, Swedish massage and Reflexology massage than female spa consumers.
- Almost half of the current spa consumers spent on average at least 2 hours or more at the spa
- For an average spending of THB 1,500 (USD 50) or more, proportionally male spa consumers spent slight higher than female spa consumers. This can be explained due to the fact that male spa consumers are slightly older than the female spa consumers, and as such might have a higher disposable income.
- A higher proportion of male spa consumers visit the spa with their spouse or partner. This is in sync with the fact a higher proportion of male survey respondents are married or living with their partners.
- Compared to current spa consumers, a higher proportion of potential spa consumers expect to visit the spa with their friends or family and relatives.
- Currently most spa consumers visit the spa during the weekend. Proportionally, more male spa consumers visit the spa during weekdays than female spa consumers; whereas the inverse is true for spa visits on the weekend.
- Proportionally, male spa consumers used more sauna, fitness and steam room facilities than female spa consumers. Female spa consumers used Jacuzzi more than male spa consumers.
- Apart from spa treatments, current spa consumers spent money mostly on tip/gratuity to staff.
- Proportionally, female spa consumers purchased more facial products and body lotions than male spa consumers.

- *Internet* and *word of mouth* were the 2 main approaches for current spa consumers to search for a spa. For potential spa consumers, *Internet* and *word of mouth* remain very important methods to search for a spa, but *social media* and *magazines* assume higher importance as well, when compared to how current spa customers search for a spa.

Opinion on Spa and Spa Products

- For male as well as female current spa consumers, *quality of treatment*, *hygiene* and *atmosphere* were the 3 main important factors when visiting a spa. Potential spa consumers cited the same 3 factors as the most important.
- In terms of spa products, current spa consumers had a higher preference for well-known brands than potential spa consumers.
- Most consumers prefer the use of organic products.

Opinion on Therapists

- Most current female spa consumers prefer either female therapists or someone depending upon the therapy or treatment.
- 16% of current male spa consumers prefer male therapists.
- Most potential spa consumers have a preference for female therapists. This might be due to the fact that potential spa consumers does not have enough experience to decide what exactly they want in term of therapists.
- The top 3 important characteristics of therapists for both current and potential spa consumers are *pleasant behaviour*, *responding to individual needs* and *ability to explain therapies and treatments*.
- When comparing the opinion of current spa consumers and potential spa consumer, it can be seen that *pleasant behaviour* is more important to potential spa consumers, whereas *responding to individual needs* seems to be more important to current spa consumers. It illustrates the fact that experienced spa consumers put a lot of emphasis on individualized attention.

Future Expectations

- When comparing the opinion of current male and female spa consumers, it can be seen that *authentic treatments/therapies* is more important to male spa consumers, whereas packages based on packages based on *discount and time spent in the spa* and *individual persons* seems to be more important to female spa consumers.
- Potential spa consumers would also in the future like to see more spa cuisine/healthy cuisine in spas.

Future Spa Visits

- Almost 80% of current spa consumers are likely or very likely to visit a spa in the next 12 months.
- 38% of potential spa consumers are likely or very likely to visit a in the next 12 months.

Part C:
Spa Operator Research

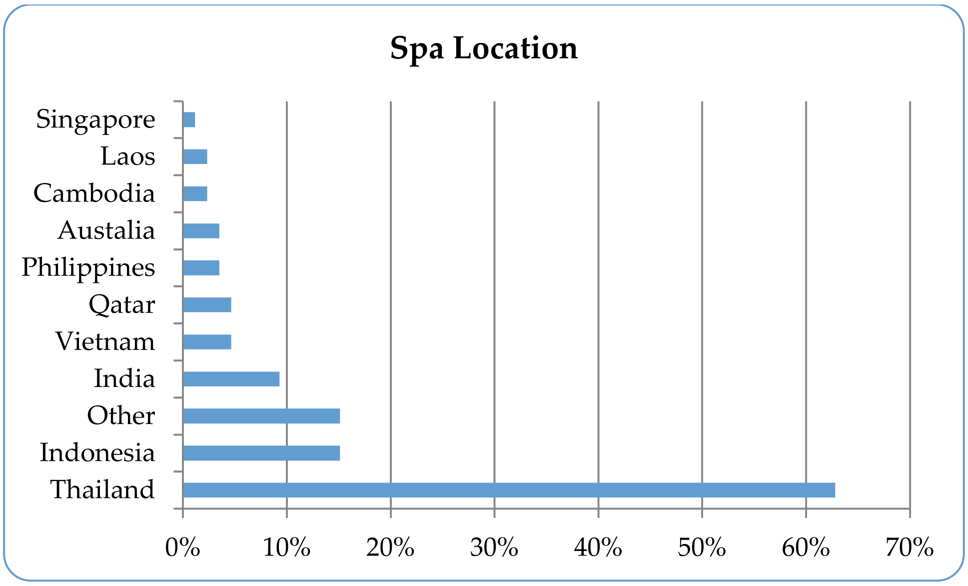
C. SPA OPERATOR RESEARCH

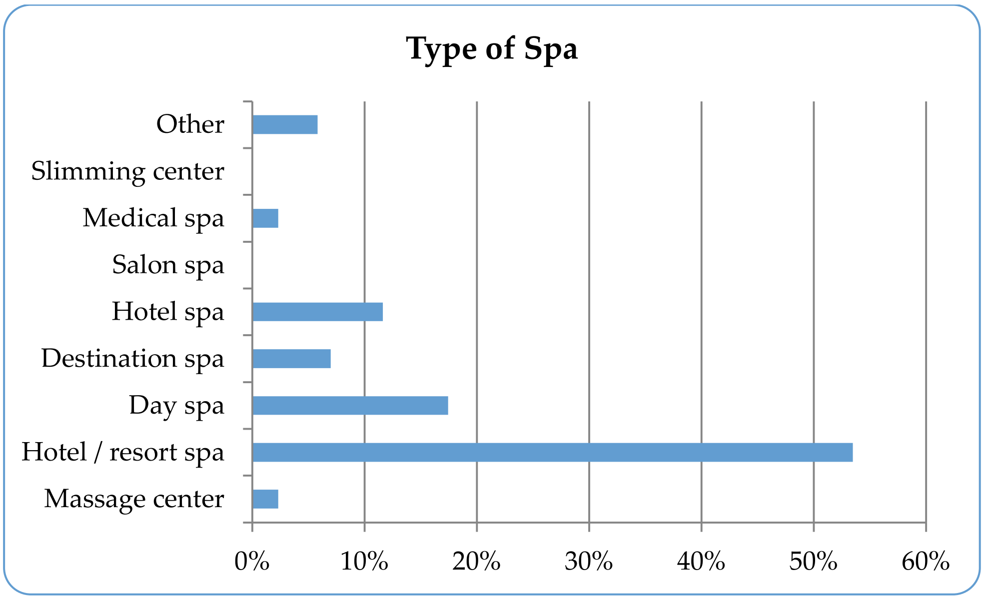
C1.RESEARCH RESPONDENTS

C1.1 FOCUS GROUP AND INTERVIEW RESPONDENTS

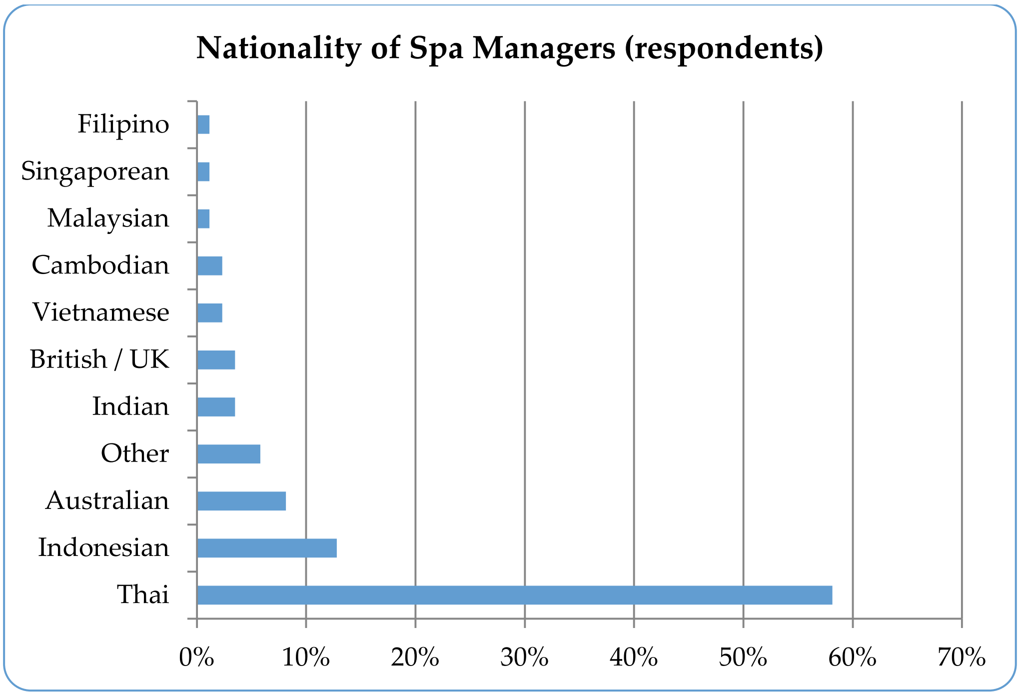
There were 10 participants in the focus group and they were all spa managers at reputed spas in Thailand. During this research 14 interviews were conducted and most of the respondents with Spa Directors and/or highly experienced spa managers and consultants. A list of the respondents for the Interviews can be found in Appendix I.

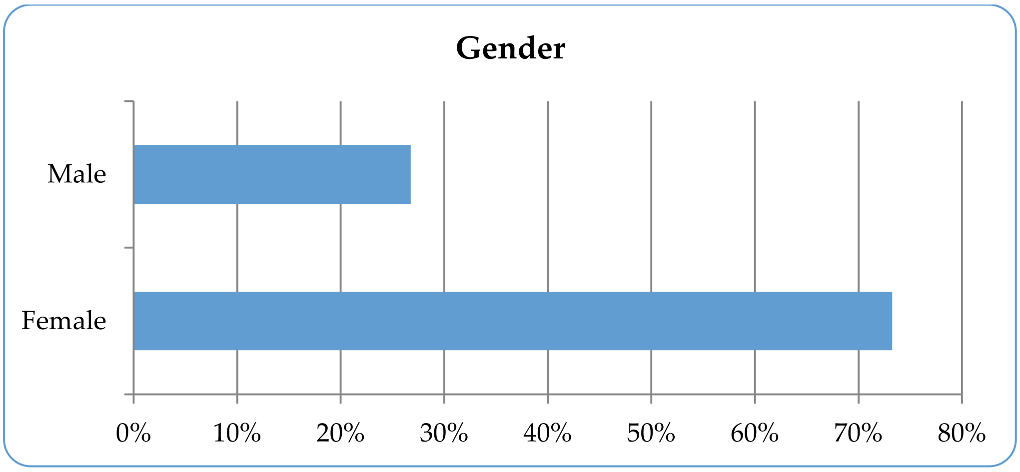
C1.2 SURVEY RESPONDENTS





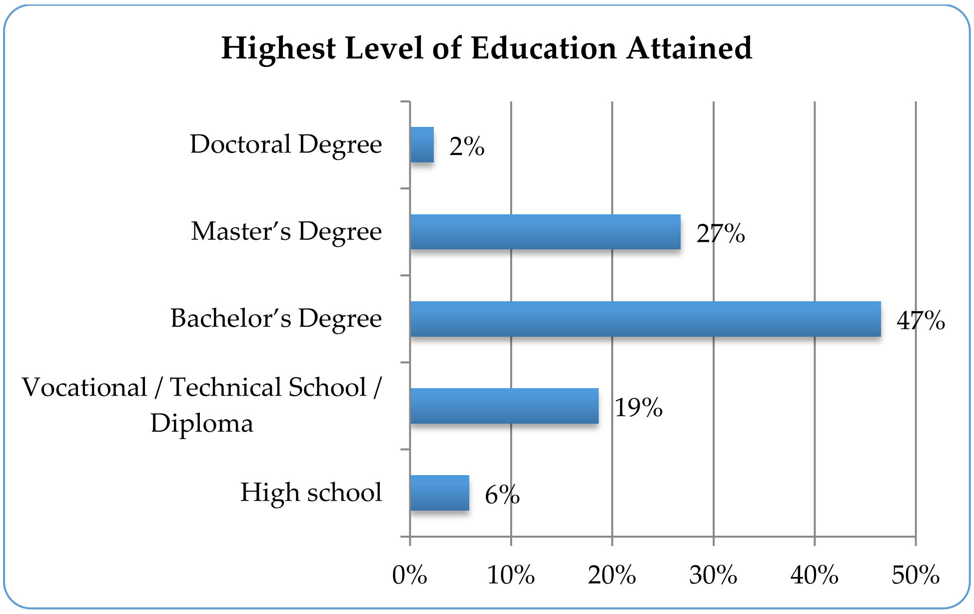
There were 86 responses to the online surveys (almost all by spa managers) and as can be seen from the charts above, most of them were from Thailand and Indonesia. The respondents were mostly working in a spa related to a hotel or resort (hotel spa, destination spa), with the next common spa type being Day spa.

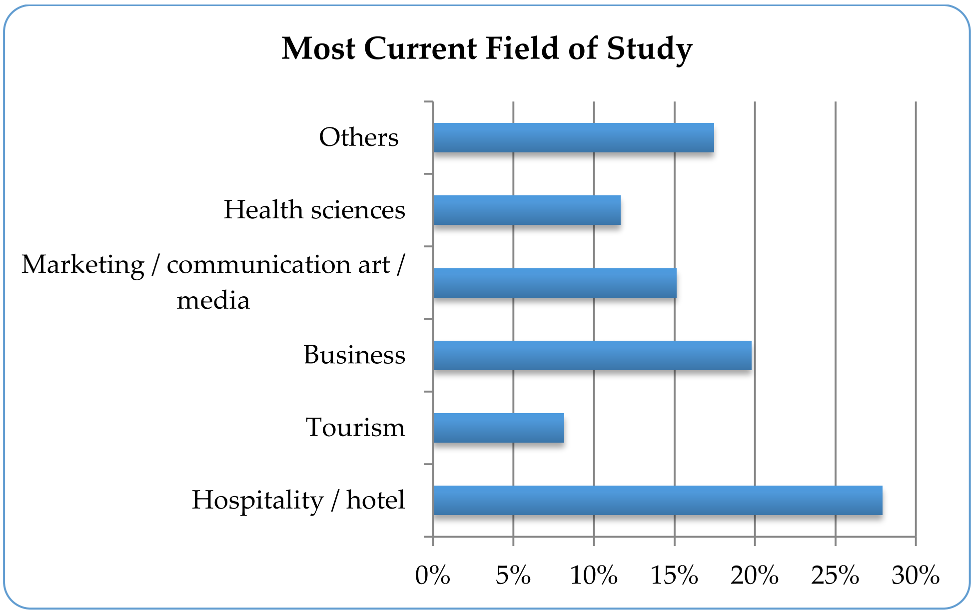




Most of our respondents were Thai nationals, althought there was a good mix of Indonesian, Australian and other nationalities. Not surprisingly a high number of our respondents were females.

C2. SPA MANAGER SKILLSET AND EDUCATION





From our survey respondents, it was seen that almost half of the spa managers had completed a bachelor's degree. More than a quarter of the spa managers had also completed a master's degree. The field of study does vary among the spa managers. Hospitality and tourism was the most common field of studies for spa managers followed by business, marketing/communication and health sciences. Other studies include amongst others arts, beauty and politics.

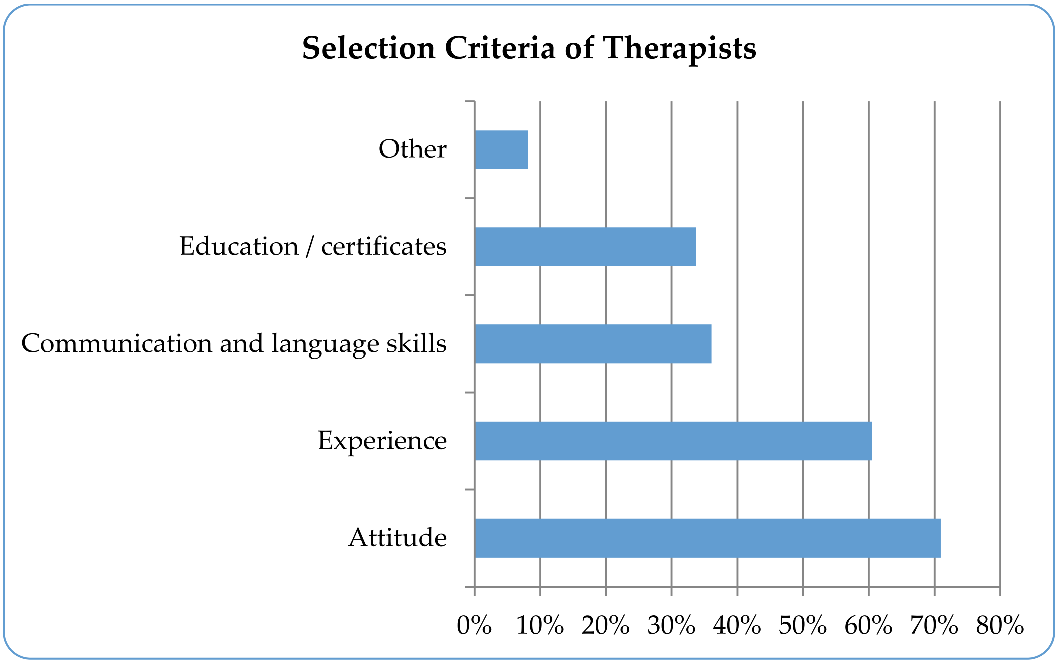
Comparing the survey responses to the interview and focus group outcomes, it can be suggested that business skills are most important skills for spa managers to possess. The majority of interviewees think that the hard skills are more important than the soft skills for a spa manager. For example quite often spa managers are expected to write marketing plans, set KPIs, make plans to achieve quality standards, guide staff and much more.

According to a spa operator working for a large luxury hotel brand, hotel spa managers should possess hard skills because one should be able to discuss with the General Manager of the hotel on a managerial level in order to be taken more seriously. Spas are still frequently seen as an amenity in a hotel, while it has become an actual revenue stream for a hotel with a high profit margin.

Besides the fact that hard skills are seen as most important for the spa managers, many of them also do think that is it good to start with basics. According to many interviewees, a spa manager should know about the therapies and treatments offered in the spa in order to provide better guidance and gain a better understanding towards the therapists. A phenomenon that sometimes occurs in the spa industry is that spa therapists get promoted to spa manager because of a good understanding of the spa he/she is operating although no additional education in management/economics has been acquired. This is though, not a common norm in the industry.

Currently, only few countries provide education courses/certifications for operating a spa. Several interviewees think that more professional education programs and certifications of spa managers in the future are essential and would be very useful. In the opinion of most interviewees, these programs should cover a combination of management skills and spa treatments and therapies.

C3. SELECTION AND TRAINING OF SPA THERAPISTS



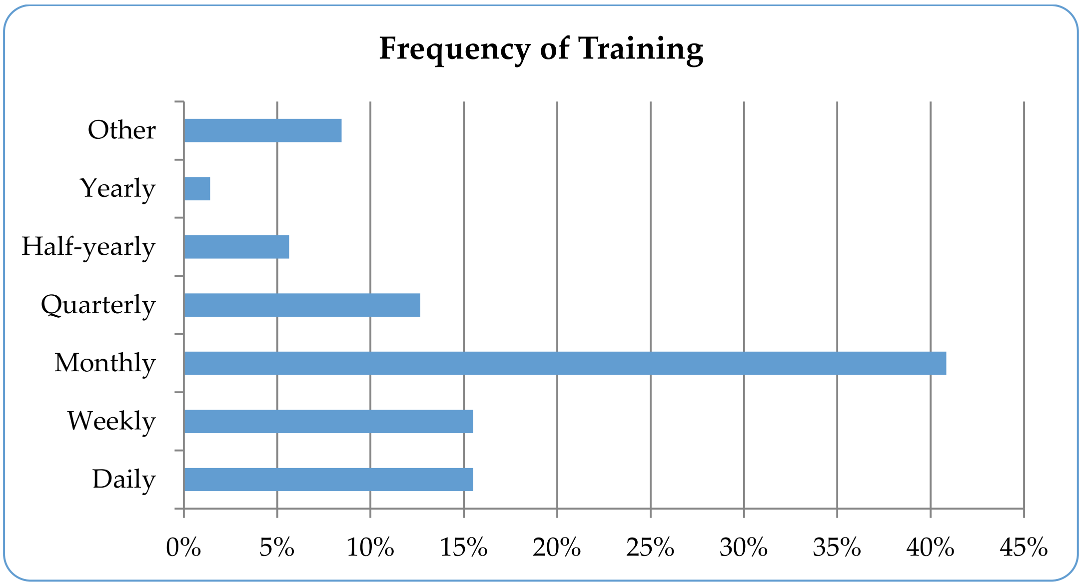
Respondents to our research were of the opinion that in the selection of therapists, managers mostly look at attitude and experience. The general opinion was that skills to properly executive spa treatments and therapies can be trained, but a good attitude is something that is very intrinsic and something that is very hard to train. Hence spa managers put their focus on attitute based hiring.

Experience was also seen as more important than education/certification, as only with experience can a because one learns how to really perform for example a massage when having more experience with different customers.

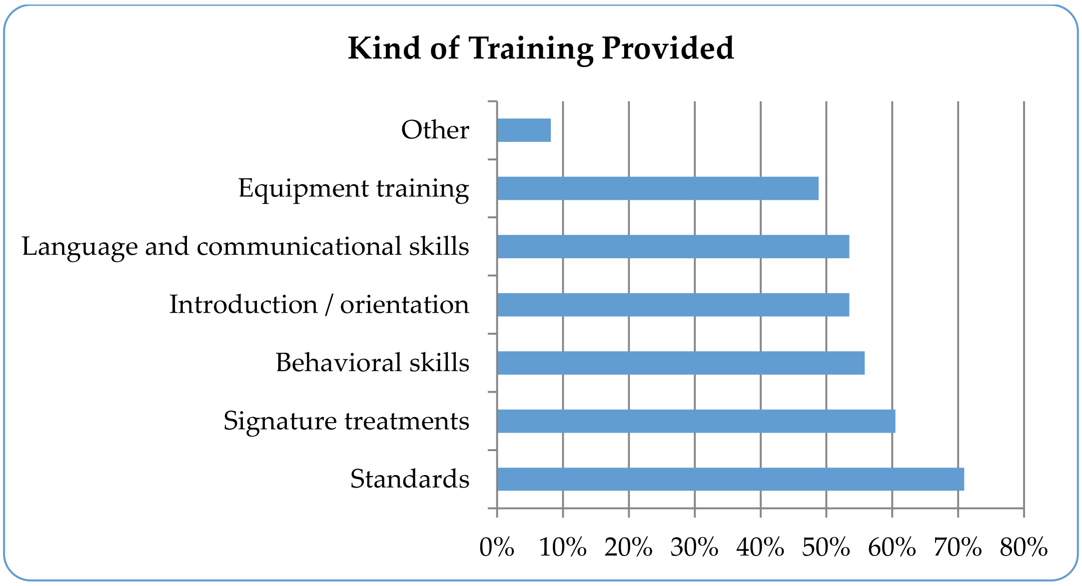
Besides, respondents of the survey were of the opinion that certification on therapies/treatments from Thailand and/or in Asia does not really say a lot since it is available for everyone who can pay for the training course. It is important that a therapist can actually show their performance.

Over the last few years, the communication skills have also become more important as a selection criteria. From the statistics can be seen that most spas target tourists. As tourists mostly do not speak Thai (or the local language), it makes it very important that the therapist can speak either the language of the guest or English in order to communicate with the guest about their wants and needs.

It should be noted here that respondents did not consider the nationality of the therapists to be very important while recruiting. Currently, most spas choose for therapists from within the country where the spa is located. The primary reason being that, it is easier to get work permits that way. Furthermore local hires also reduce the total salary costs. However, specific treatments do require therapists from a specific nationality. For example, many consumers find it unconceivable that a Thai massage is being done by an Indian therapist.



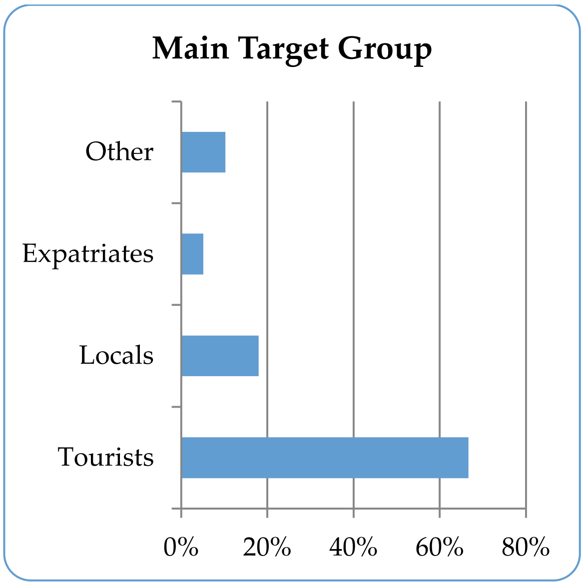
Most spas provide regular training for their therapists. These vary from daily, weekly, monthly, quarterly and yearly. Monthly training seems to be the most common.

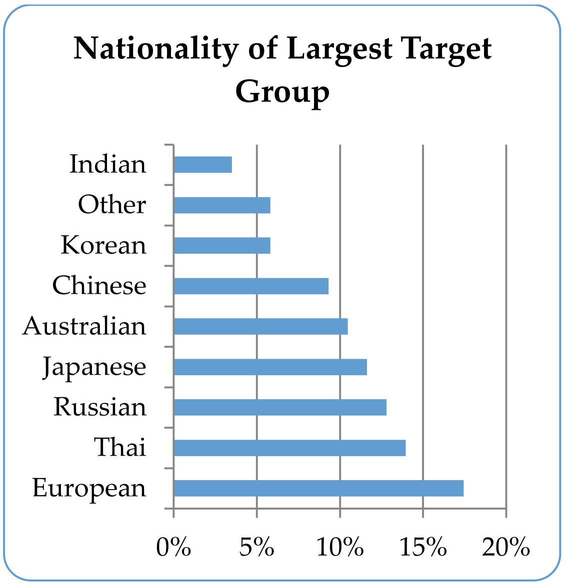


As can be seen from the chart above, the kinds of training provided include standards, signature treatment procedures, behavioral and communication skills. Spa managers also cite introduction and/or orientation training to be very important. It was very unexpected to find that only 53% of the survey respondents provide Introduction and Orientation training to new employees.

C4. CHANGES AND DEVELOPMENTS IN SPA CONSUMER DEMOGRAPHICS

For many spas, tourists are the still the largest target group, though the importance of local residents and expatriates are increasing. As a high number of our respondents are from the Hotel and resort sector, out analysis does show a slight bias to their concerns. In terms of nationality of target group, European (including Russian) consumers are still one of the largest target groups.





But there is a general consensus that the clientele is changing to Asian customers. More Chinese, Japanese and Indian customers have started to visit the spas. In the case of China and India, continual economic growth has led to an increase in outbound tourism, which has also affected the spa industry. Spa consumers from China are expected to grow immensely in the future.

Another interesting observation that is being made by the respondents has been with regards to direct flight availability. The presence of a direct flight route influences tourism and hence indirectly affects the spa industry as well. Direct flights between destinations encourage leisure travel. For example, if there is a direct flight Ulan Bator and Bangkok, more Mongolian nationals can be expected to visit spas in Bangkok.

With regards to the gender of the spa consumers, most spas still have more female than male visitors. There has been an increase in the number of male visitors over the last few years, although there has not been a big change in the male/female ratio. Reason for the slightly increased amount of male visitors is the fact that it is becoming more common for men to take care of themselves. Men are becoming more interested in wellness and beauty treatments as well. There has been a greater realization among men that a good appearance is also important. The spa industry is expecting more male customers in the near future. At this moment, male visitors mostly prefer massages, but it is expected that they will demand more and different treatments and therapies in the future.

C5. CHANGES AND DEVELOPMENTS IN CONSUMER EXPECTATIONS

Most respondents noted that there are big differences in terms of expectations of customers. Therefore it is very important that spas identify and get to know their target group very well. Otherwise it will be very difficult to meet their demands and expectations. Some of the key changes and developments in consumer expectations as identified by the respondents are as follows:

1. Most respondents have confirmed that demands of Asian customers are completely different than those from European customers. Currently, Asian spa consumers are looking for high tech skin care, rather than body treatments. Especially the Chinese consumers are really enthusiastic about the usage of high tech machine to analyse their skin.

2. Although massage is the most popular treatment among all nationalities, the preference of how a massage should be carried out does differ across countries. Mostly, the Asian spa consumers like strong massages, such as Thai massage or deep tissue massage, whereas Europeans prefer lighter treatments.

3. Japanese and Chinese spa consumers are probably more critical than others when it comes to spa treatments. Chinese spa consumers are result-oriented and less interested in pampering treatments. They want to feel that there has changed something in their body.

4. Japanese spa consumers demand more beauty and anti-aging, and are completely different from Chinese consumers. The cultural, national and ethnic background of spa consumers also has an effect on their preference of treatments. Apart from the skin care, Chinese consumers mostly prefer massages, whereas consumers from Hong Kong demand a massage plus scrub or bath and they like packages. Russians and Koreans prefer strong massages. Americans mostly ask for manicure and pedicure and European guest usually only take a massage. Swedish customers tend to take a soft massage.

5. There are also differences between male and female consumers. One of the most important differences between male and female consumers is the treatment time. Most female consumers prefer longer treatments.

6. Differences in demands between local and international consumers can be seen as well. Local consumers usually demand result-oriented skin care that targets specific problems (e.g. whitening, anti-aging and cellulite). The Thai healing therapies are not often taken by international guests; they tend rather to facials and body treatments.

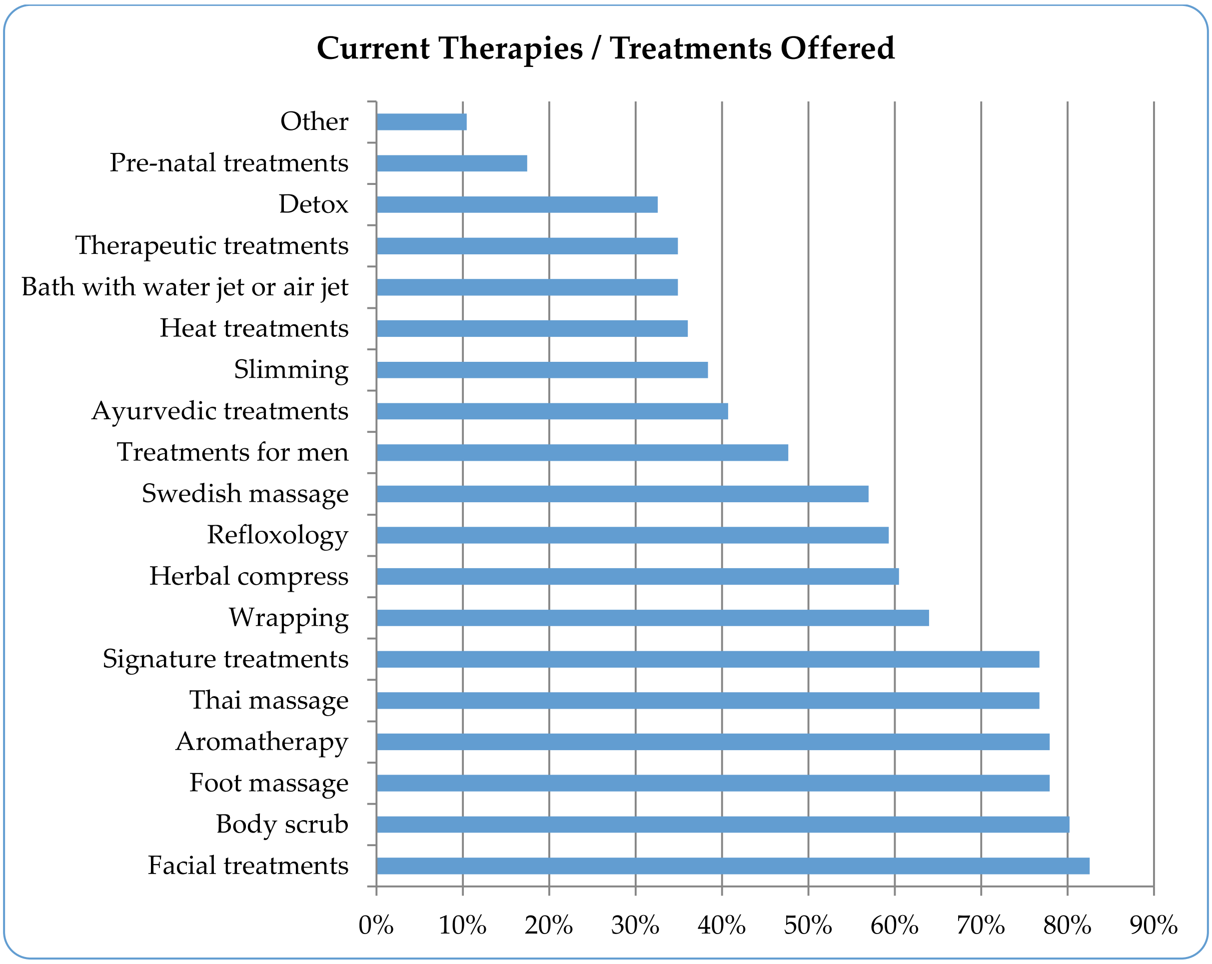
7. In general, spa consumers are demanding more beauty treatments and they want to know how the treatments are affecting them. They want to see the results, which is different from the past. Customers want completely customized treatments, not only

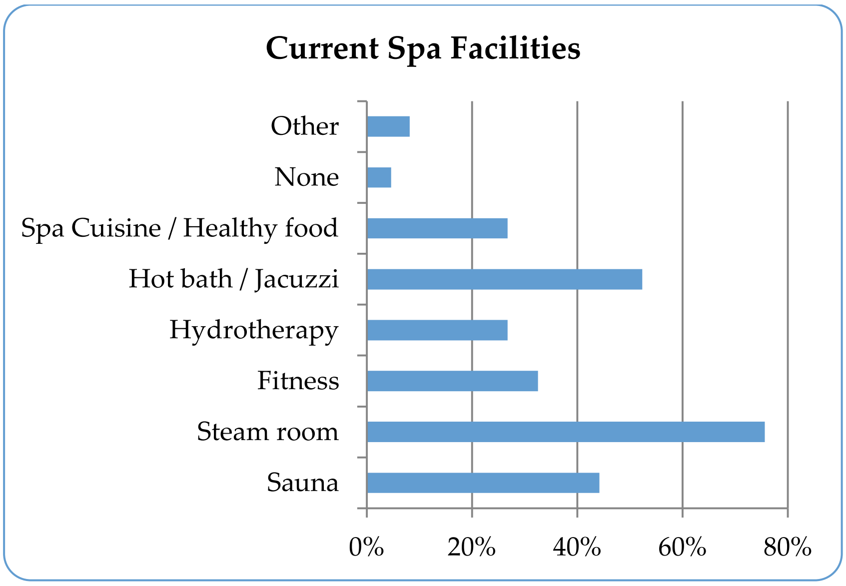
relaxing, not only the emotional reaction but also a physical difference after the treatment.

8. There is an increasing demand for spa cuisine in general. People are becoming more and more aware of their lifestyles. They prefer a healthy lifestyle nowadays, which also includes healthy food. The balance between mind and body and eating healthy is popular. Cuisine is important nowadays and healthy snacks and juices are more provided in spas according to hotel spa managers. In the past this might have been a trend, but nowadays spa cuisine has become a necessity and even a threshold capability for spas.

9. The demands in terms of products are quite stable. Customers prefer a third-party line for facials. Reason for this is that it is perceived by the customers as more trustworthy and the face is just a very important part of the body since it "cannot be covered up". For body treatments, there is no dominant preference for either a third party or own brand. Something that is changing is that more and more customers prefer organic products.

C6. CHANGES AND DEVELOPMENTS IN SPA THERAPIES/TREATMENTS





The above 2 charts presents the most common therapies/treatments and facilities that are currently being offered in the spas.

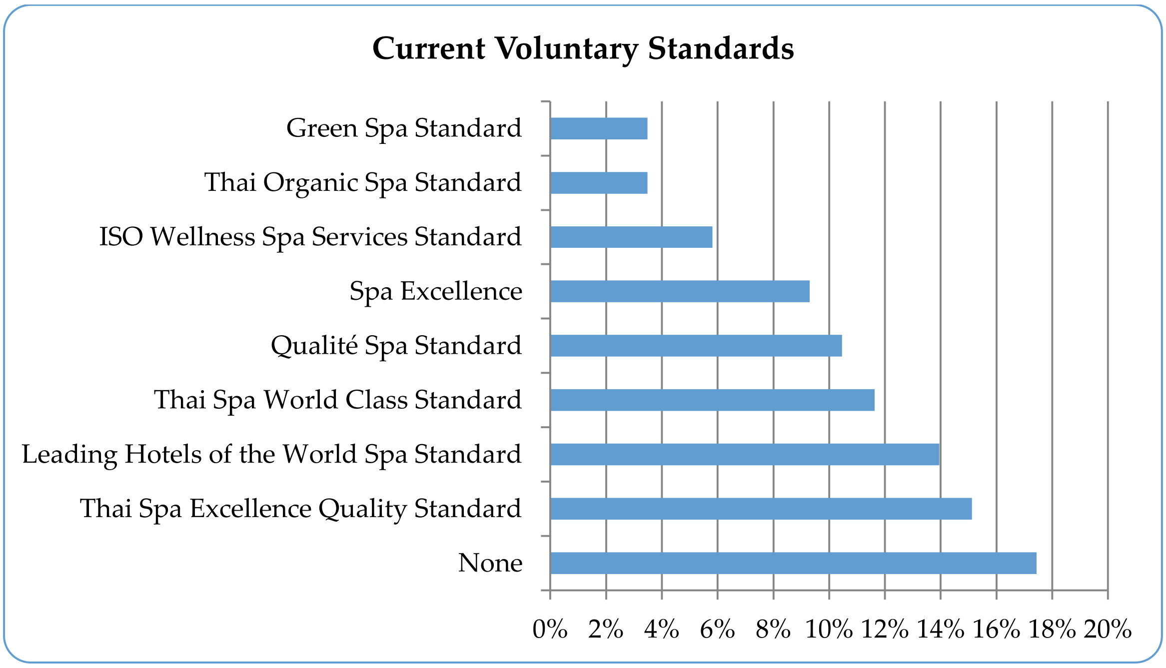
There though exist different opinions concerning trends and developments in the industry. It is commonly accepted that media seems to dictate a lot of these developments. Interviewees state that a few years back the spa industry was really in a peak; the business was booming. Presently, the industry is growing, but differentiation has becomes more and more important, as currently competition is high and increasing.

It is generally accepted that most spa consumers visit a spa mainly for relaxation, and massage, no matter where in the world the spa is, is generally the most popular treatment. However several expected changes in treatments and therapies were mentioned by interviewees.

1. Quite a big link is started to develop between the medical industry and the spa industry. Eastern and Western philosophies about healthcare are melting together. People take more responsibility for their own wellness. People notice that they can do a lot to keep themselves healthy. Medical spas are quite a different field and therapists need to be trained in another field. Most therapists are trained to do spa treatments only. Unless proper training is provided, therapists will not have the right skills to perform medical treatments. Furthermore medical spas also need to have license to be able to provide those trainings as well as treatments.
2. Hammam treatments are expected to merge with the Asian knowledge and Asian herb therapies. The development of a mix of therapies from Asian countries and European treatments will continue and will influence several treatments.
3. Consumers have started to socialize at the spa. They use the treatments as a way to hang out with friends; the social aspect is really prominent now. People like to talk during or after their treatments. Business people in particular; they want to release stress and have a nice talk as well. Besides the socializing with friends, many customers also want to talk with their therapists. Therefore, language is becoming a more important skill for therapists.
4. Visiting a spa for beauty treatments and skin care is becoming more popular. Brightening and whitening treatments are developing rapidly in Asian countries. It has been always been like that, but it became more widespread and understood. The future is thus focused on results-driven skin.
5. The integration between spa and daily life is becoming more visible according to several spa managers. Physical differences are becoming more important. There will be more and more usage of technology in spas, e.g. DNA profiling and skin scans. In case customers want something more advanced (e.g. Botox), they will go to a specialist rather than a spa.
6. The quality and skills of the therapists will be more important than the treatment or the used product itself. The focus will as well be on language training, behavior training, and sales training for therapists, as well as on customer service.
7. It is expected that the focus will be more on wellness and innovative treatments. An important expected development is therapeutic massage for office syndrome to reduce job-related stress. Also specific need for elderly people will become more important. More expected developments are four-hand massages, bamboo massages, chakra massages and music therapies.

8. Organic products will be used more, as well as Thai herbs. There will be more focus on green and environmental friendly practices.
9. Ayurveda medicine practices and Ayurveda spas are expected to grow.
10. Spas often add new treatments while not taking anything off the menu. Several interviewees tend to believe that less is more. They try to stay with the trends and add a new treatment to their menu, but at the same time take one off. Menus have been too extensive; in the future menus need to be fine-tuned, more streamlined, easier to read and it needs to be changed regularly. People are also looking for new things, but the basis will stay. Seasonal promotions are seen as a good way to vary the menu regularly.
11. Lower prices for therapies and treatments are expected in the spa industry. Prices have already dropped enormously compared to five years ago, and this will continue because of all the new properties that are coming up, especially in Bangkok.

C7. ROLE OF STANDARDS IN THE SPA INDUSTRY

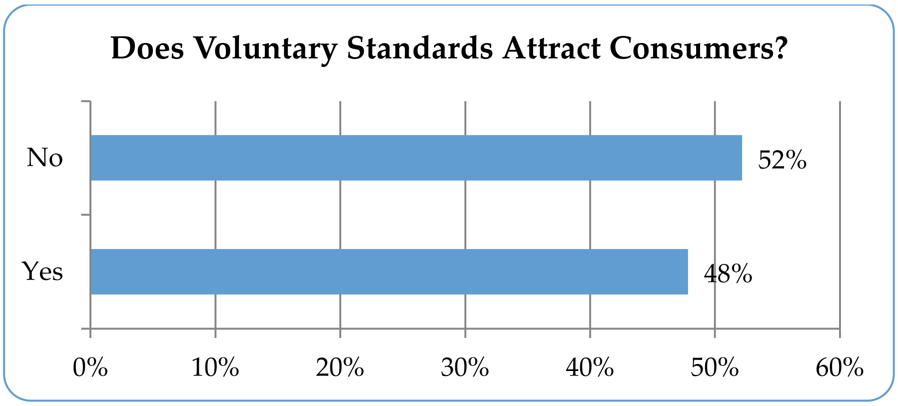


The chart above shows the voluntary standards that the respondent spa's possess. When asked about legal standards of operating a spa, there were some confusing answers, because only a few of the ASEAN countries have a legal standard for operating a Spa. Most respondents, both from Thailand as from the other ASEAN countries, do think that a national standard for operating a spa would be beneficial for the image of the spa industry in that specific country.

Reason for this is that a legal standard proves that the spa is operating on certain professional level that has been defined by the government. Furthermore, most of the interviewees think that the AEC 2015 will also change the spa industry in term of standards. It is then needed to have standards that everybody knows and accepts.

When focusing on Thailand, most interviewees say that the spa industry is doing really good in terms of standards. Thailand is quite unique for this since not many countries have them. One of the biggest benefits of having these standards is the influence it has on the image perception of guests. Though, some interviewees see the 'cheap' massage stores as a big threat. They operate under the name of a spa but are not certified in any way and provide business that damages the image of the customers. These interviewees hope that something will be done in the future about this phenomenon.

Although a lot of Spas have voluntary standards (sometimes multiples), no dominant opinion showed up about whether having a voluntary standard would bring a spa more customers. 52% of respondents do not think that having a voluntary standard will attract customers. The main reason for this is that many voluntary standards are not known by the customers, hence using them as a marketing tool is not very useful. Hotel spa's mention that voluntary standards as a marketing tool will make no sense since the customers choose the hotel rather than the spa. Spa managers of day spa's and destination spa's mention that it would be good if these voluntary standards get more promotion in order to spread the recognition of them among customers.



Though currently the voluntary standards are not useful as a marketing tool, they are definitely useful for other purposes. The standards can only be obtained when specific operational performance levels are reached. This means that many training guidelines are given to the managers, supervisors and therapists. For the voluntary standard to be awarded, independent audit is conducted to a list of criteria. Therefore, it is generally accepted having voluntary standards leads to higher credibility of the spa operations.

C8. AEC 2015 AND THE SPA INDUSTRY

The AEC 2015 (The ASEAN Economic Community) will transform ASEAN into a region with free movement of goods, services, investment, skilled labor, and freer flow of capital. We asked our respondents to comment on how they think AEC 2015, will impact the spa industry in Thailand and ASEAN. We have summarized the responses in the table below.

Pros	Cons
• Increased investments in the spa industry • Greater potential to expand to ASEAN Countries • More talent and knowledge sharing • Increased competition environment will lead to setting up of tougher spa standards • Improved standards of therapists • More diversity in the spa industry • Increase in the number of multi-cultural therapists • Increased creativity to deal with competition • Increased manpower market to recruit from • Increased choices of spa products • Increased opportunity for career moves and promotions	• More competition • Therapists would need greater language and communication skills like Chinese • Higher need for differentiation, need to develop signature treatments • Increased competition in the recruitment of skilled managers and experienced therapists

As can be noted from the table above, although spa managers think that AEC 2015 will bring along some challenges, most spa managers are very positive about its impact on the spa industry.

C9. IMPORTANT OBSERVATIONS

Some of the key observation from this Spa operators Research are highlighted below.

Skillsets Important for Spa Managers

- Respondents believe that hard skills (management and operational) skills are still very important for spa managers
- There is a greater need for professional educational programs and certifications for spa managers.

Selection and Training of Therapists

- Attitude and experience are the two most important criteria that spa managers look for when recruiting therapists
- In terms of training being provided to therapists, in addition to training on standards and specific therapies and treatments, training on language /communication skills and behavioral skills are growing in importance.

Changes / Developments in Spa Consumer Demographics

- Tourists still remain the largest target group.
- Europeans (including Russians) still constitute one of the largest target groups
- Increasing shift to more Asian spa consumers (China, Japan, India)
- Spa consumers from China are expected to grow immensely in the future
- Male spa consumers have increased, but there has not been a significant change in the male/female ratio.

Changes/Developments in Consumer Expectations

- Asian spa consumers are looking for high tech skin care, rather than body treatments.
- Spa consumers are getting more result-oriented and probably slightly less interesting in pampering treatments.
- Increasing demand for beauty treatments and customized treatments.
- Increasing demand for spa cuisine.

Changes/developments in Spa Therapies/Treatments

- Medical spa and associated treatments is growing
- Spa consumers are now “socializing” at the spa
- Increased use of high technology in spa
- The quality and skills of the therapists becoming more important than the treatments itself
- More innovative treatments are coming up such as therapeutic massage for ‘office syndrome’.

Role of Standards in the Spa Industry

- Respondents of this study do think that a national standard for operating a spa would be beneficial for the image of the spa industry.
- There was no dominant opinion on whether voluntary standards attract spa consumers; the opinion was pretty much equally divided.
- Respondents do believe that the voluntary standards leads to higher credibility.

Impact of AEC 2015 on Spa Industry

- Although spa managers think that AEC 2015 will bring along some challenges, most spa managers are very positive about its impact on the spa industry.
- Spa managers cite the increased investment, improved standard of therapists, tougher spa standards, increased diversity in the spa industry as some of the positive aspects of AEC2015
- Increased competition in the recruitment of skilled managers and experienced therapists, increased competition, higher need for differentiation, and greater need for language and communication skills are some of the key disadvantages that spa managers perceive from AEC 2015.

Appendix

APPENDIX I – INTERVIEW RESPONDENTS, SPA OPERATOR RESEARCH

Cathy Turvill President- Nurture Spa Village; President- Spa and Wellness Professionals Philippines
Andrew Gibson Group Director of Spa, Mandarin Oriental Hotels Group Hong Kong
Sunai Wachirawarakarn Director, Spanovator, Innovative Spa Consultant Thailand
Jeed Wipawadee Sirimongkolkasem Managing Director, Devarana Spa Co., Ltd. Thailand
Jinny Sindech Spa Consultant and Trainer Thailand
Tara Hanrahan Regional Spa Operations Manager - South East Asia, Hilton Worldwide Thailand
Jirarat Myata Spa Consultant Thailand
Elaine Chua Tamte Group Spa Director, Centara Hotels and Resorts Thailand
Brian Hathaway Chairman, Asia Pacific Spa and Wellness Coalition Singapore
Supanee Tientongtip Spa Director, Four Seasons Hotel Bangkok Thailand
Megan Tan The Sompotan Spa Malaysia
Pakin Ployphicha Owner, The Oasis Spa Thailand
Suchela Jackson Spa Manager , Amari Watergate Bangkok Thailand
Dr. Anchulee Yongarnukul Managing Director, St. Carlos Medical Spa Thailand