

Spa mantra

India's Spa & Wellness Magazine

SEPTEMBER - OCTOBER 2011

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India - Emerging Global Spa & Wellness Destination

India provides a perfect environment
for holistic retreats.

Serenity Capital-ized

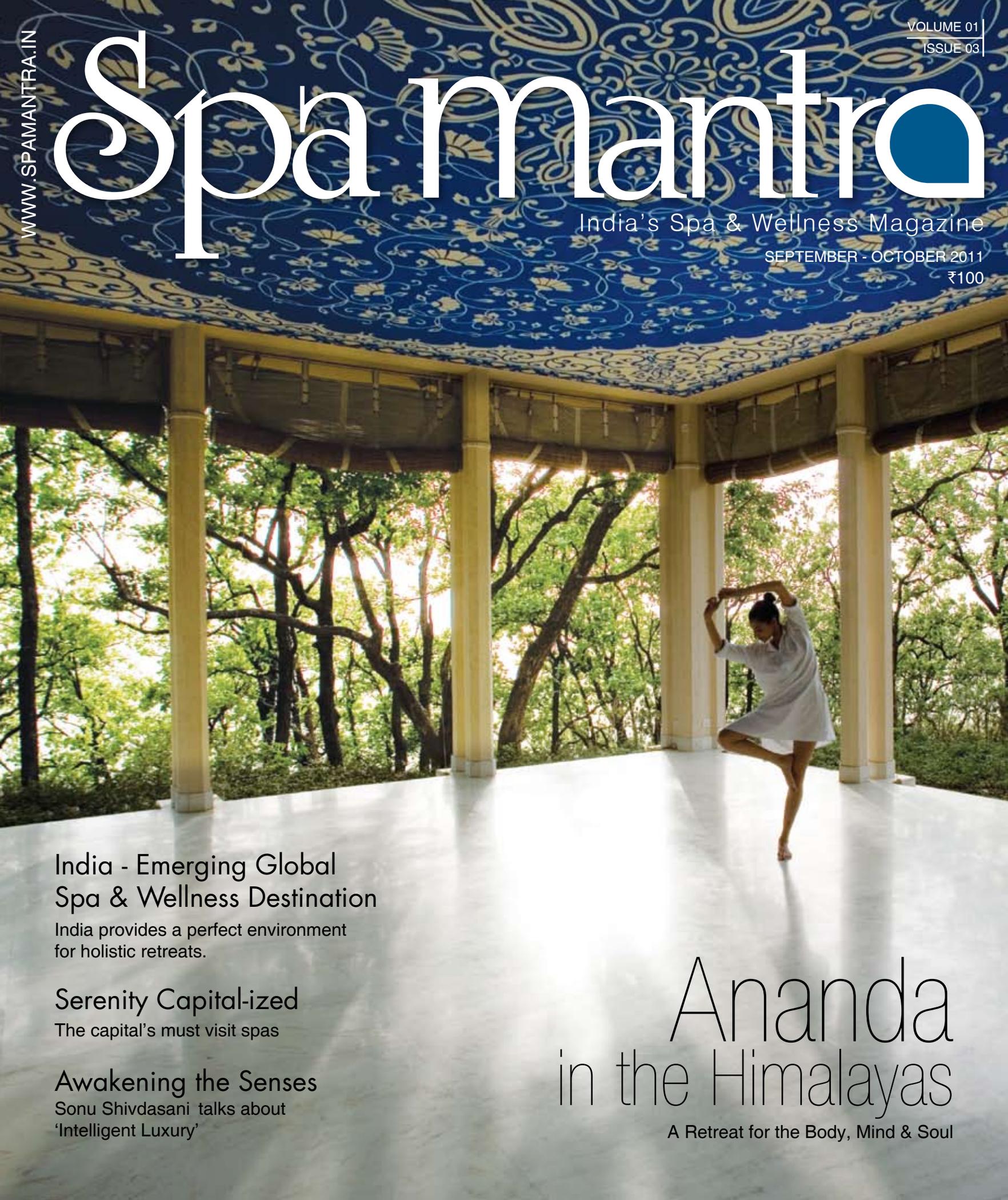
The capital's must visit spas

Awakening the Senses

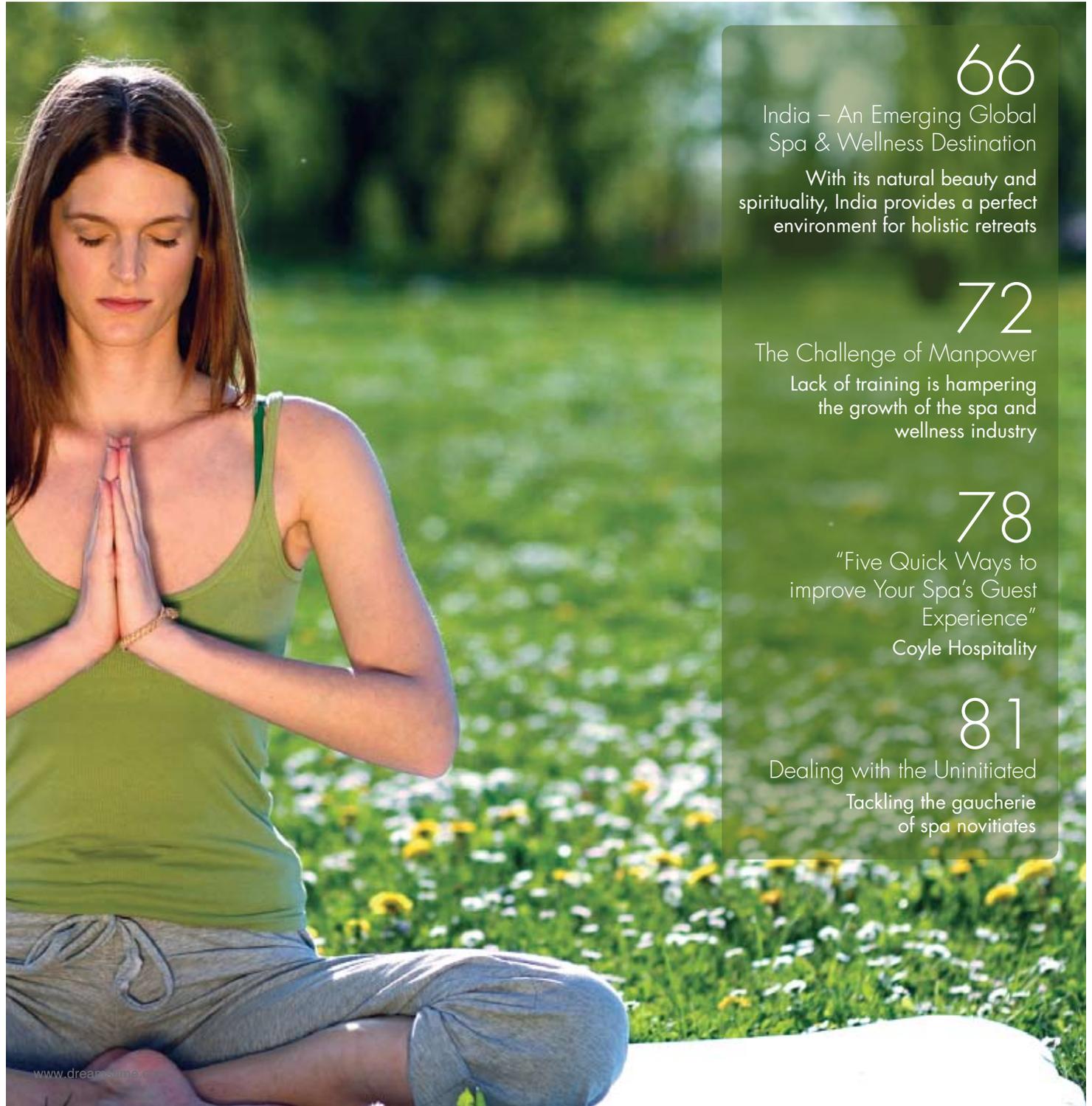
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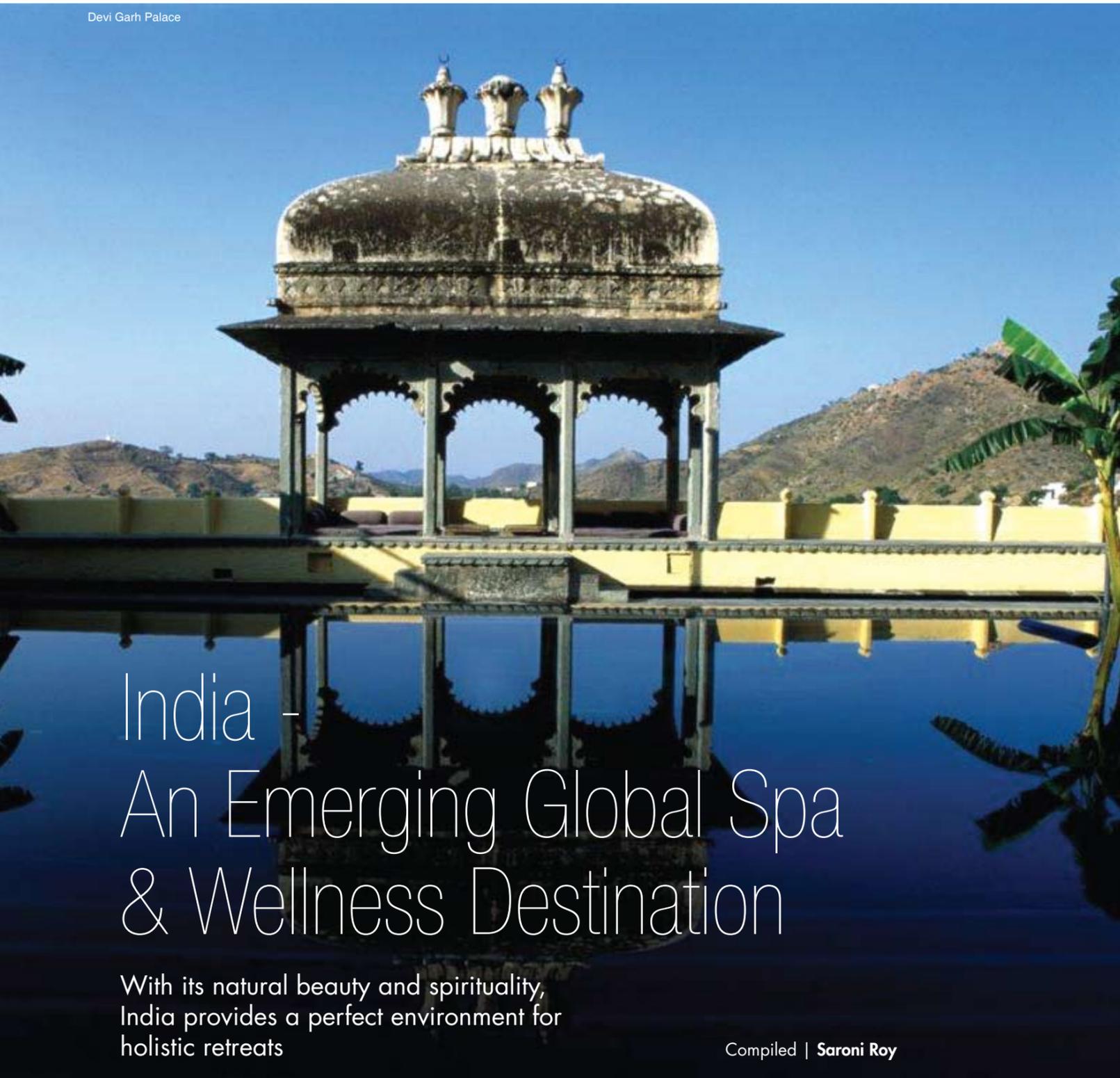
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India - An Emerging Global Spa & Wellness Destination

With its natural beauty and spirituality, India provides a perfect environment for holistic retreats

Compiled | Saroni Roy

Rising income levels and increasing awareness towards wellness as a lifestyle and the enormous expansion in the hotel industry has led to the phenomenal growth of the Indian spa industry in the last few years. India's spectacular natural beauty coupled with the centuries-old wisdom of healing practices, Yoga and Ayurveda, presents India with all the attributes to be the most tempting spa destination in the world. With destination spas in Himalayas and the deserts of Rajasthan to Ayurvedic retreats in the South, India has become a hotspot for spa lovers.

Realising this potential, the Ministry of Tourism, Govt. Of India has recently launched the initiative like promoting Yoga and Ayurveda as a global brand and promoting the Indian Spa industry as a global spa destination in a more organised and standardised manner.

Spa Mantra spoke to industry experts to comment on the needs, growth and the future prospects of this highly potent industry.



Shankar Prasad,
Executive Director, Everstone Capital Advisors India Private Limited.

Everstone Capital Advisors is an investment advisor to Everstone Capital which manages dedicated PE funds in excess of \$1 billion. Everstone has offices in Mumbai, Delhi and Bengaluru with over a hundred people making it one of the largest private equity and real estate advisory platforms in India.

Indian Spa Industry - Drivers and Barriers

Three main factors driving growth in the Indian wellness industry:

- **Rising disposable incomes** – expected to grow at 6% y-o-y over the next 20 years.
- **Increasing propensity to spend** – have money, will spend.
- **Compulsive need to look good** – Beauty is an essential spend now, spa services continue to be a discretionary spend.

Also, paradoxically, as incomes rise, lifestyle disorders are also on the rise. This is leading to people seeking out alternative therapies for curing disorders like sleeplessness, backache, hair-fall etc. Ayurveda is being re-packaged as a solution for these illnesses, with encouraging results.



Wellness industry is highly fragmented and loosely defined, so there are few reliable estimates available. Depending on definitions (and beliefs!) the overall wellness services industry size today is between Rs.10,000 and Rs.15,000 crores (\$2.2to3.3 bn). One can expect the industry to grow at least 15% annually, with beauty services growing at an even higher rate.

Major barriers to growth are:

Lack of Standardization: Wellness services industry has grown without much regulation or standardization. This has led to haphazard growth, confusion in consumers' minds and lack of clearly defined offerings.

Real Estate: By its very nature, the wellness services industry is real-estate-intensive. It is tough to run a services business today where rentals are less than 25% of sales, especially in the metros.

Manpower: There is not enough supply of trained manpower, which leads to each operator training its own people, only to find trained manpower leaving for competition/other sectors. Attrition rates of more than 20% p.a. are not unheard of.

Underdeveloped Franchising Ecosystem: India is yet to wake up to franchising, in general. Expensive real estate is but one of the reasons why franchising is not taking off, even in successful businesses.



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Christine Hays

Vice President, Spa Operations, Oberoi Group

Oberoi Hotels & Resorts is synonymous the world over with providing the right blend of service, luxury and quiet efficiency. The Oberoi Spas offer an unmatched array of treatments, rituals and experiences designed to renew, refresh and replenish the soul

Profile of the Spa Consumer

The spa concept in India is getting increasingly popular. However, at The Oberoi Group our spa guests are predominantly international guests (comprising 70%). Interestingly, it is not just women

but more number of men who are interested in indulging in spa therapies. We have about 60% male guests opting for various types of therapies. Keeping that in mind some of The Oberoi Spas in India have a separate Gentlemen menu which includes different kinds of treatments ranging from facial, after workout treatments, back therapy, manicures and sports pedicure etc. The age groups of spa guests range from 28 – 65.



Dr. Bhawna Gulati

Assistant Director, NABH, Quality Council of India

National Accreditation Board for Hospitals & Healthcare Providers (NABH) is a constituent board of Quality Council of India, set up to establish and operate accreditation programme for healthcare organizations.

The Need for Standardisation

Modern lifestyle has been the stimulus for the growth of diseases amongst the youth. Sadly, all these have become a part of our lifestyle. Till now, the healthcare industry has been focusing on a curative approach to medicine, rather than preventive. But it is set to change now.

With the lack of any guidelines and standards in the field and mushrooming of unorganized players, our effort may prove as a guiding light for the Wellness industry in improving the quality of care provided to the general public.

NABH Accreditation Standards for Wellness Centres provide

framework for quality of care for customers and quality improvement for Wellness Centres. NABH Accreditation Standards for Wellness Centres contains complete set of standards for evaluation of Wellness Centres for grant of accreditation. The NABH accreditation standards are approved by Department of AYUSH, Ministry of Health and Family Welfare and Ministry of Tourism.

The standards look into various aspects of functioning of wellness centres such as identifying and correcting unhygienic service delivery practices and continuous monitoring of quality of services, preventive measures safety aspects and staff training and development.

Recently Government of India has approved to provide financial incentives to the NABH accredited wellness centres & spas for their participation in various national & international events and for their marketing efforts. Accredited wellness centres will also be listed on Incredible India website for increased visibility. Though the Accreditation Program for Wellness Centres is a voluntary programme, it will go a long way in developing the Indian Spa industry and projecting India as an international wellness tourist destination providing safe and good quality of services.



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Harshajeet Kuroop

CEO and MD, Kerala Vaidyashala (i) Pvt. Ltd. with inputs from Dr. Suguna Kuroop, Director

Kerala Vaidyashala (i) Pvt. Ltd. is committed to encourage a healthy lifestyle, since three decades in the Health and Wellness Industry. With its dedication to the age old science of Ayurveda, it comprises of total health orientation with a living experience of being in Harmony with Nature. Dr.SugunaKuroop entered the Ayurvedic field 12 years ago as

Director of Kerala Vaidyashala and has specialised in Panchakarama, Ayurveda's primary purification and detoxification treatment.

herbs penetrate deep into the system to detoxify the body. But at the same time it is deeply relaxing and offers a mind, body and soul relaxation.

Yoga also focuses on relaxation of the mind and body through a series of Asanas and Pranayama or the breathing techniques. It helps to achieve a mind-body-soul balance and keeps you in harmony with nature. Both are excellent as stress relievers and help to calm and compose the mind. It helps to deal effectively with stress and at the same time brings forward alertness in mind helping to deal with difficult situations and improve productivity at work.

An Indian spa with Yoga and Ayurveda should thus imbibe these values and should be recognized as a Spa which is the authentic, genuine, and deeply soul satisfying. Maintaining the core values of Ayurveda it should effectively blend tradition with the modern times so that it appeals to all ages. The USP should be its 5000 year old tradition of Ayurveda and Yoga which is tried tested and can never go wrong. Thus when you speak about an Ayurveda & Yoga spa brand, India is synonymous.

Leveraging Yoga and Ayurveda to create an 'Indian' spa and wellness brand

Ayurveda and Yoga are both more than 5000 years old and rooted in authenticity and ancient Indian culture and tradition. Both are holistic in nature and focus on the individual as a whole. An Indian spa should thus focus on both Ayurveda & Yoga and use its essence to create a wellness brand. Ayurveda and Yoga complement each other and the results are there for all to see. Ayurveda with the use of oils and

How can India promote itself as a Global Spa & Wellness destination?

Ministry of Tourism in association with National Accreditation Board for Hospitals & Healthcare Providers (NABH) and the Department of Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homeopathy (AYUSH) have been working towards the development of the wellness sector and promoting wellness tourism in an organised manner. They organised a workshop on 'Promotion of Wellness Tourism' in New Delhi where Accreditation Standards for Wellness Centres were released by Subodh Kant Sahay, Union Minister of Tourism. The tourism department would focus on developing a common brand for multiple areas like yoga, Ayurveda, lifestyle, spirituality, art and culture, etc., with different specifications with considerations for the environment, education and quality control and extensively promoted through the internet.

The MoT also plans to provide benefits, promotional schemes to accredited wellness centres, which will have 'Atithi Devo Bhava' on their certificates. Insurance, Tax rebate/financial support from government will be provided to wellness centres for three years.

Wellness training should not just cover yoga and Ayurveda, but should also cover other target groups. The training structure has to be divided into three verticals – Ayurveda therapies, international therapies and cosmetology. There should be accreditation of prior learning and course content should be updated regularly. To ensure effective training, there should be separate bodies to develop modules, certify modules and also

implement the modules. With such initiatives towards growth and monitoring authorities for the wellness centres, India is set to be a premium spa & wellness destination. 🍊

