



ASIA-PACIFIC: *India*

CURRENT STANDING

India is the original pioneer of wellness tourism. Indians have been traveling for centuries to spend time at dedicated Ayurvedic retreats to detoxify and heal. A large component of the treatments has always been the abhyangam daily massage. This rich history has impregnated the Indian psyche resulting in modern Indians being very open to the concept of spa and taking treatments. India as a country is only now beginning to embrace the western influence and trends seeing the traditional massage merging with western spa environments. Over the past ten years the concept has grown from very basic facilities with basic massage and Ayurvedic spas to now fully integrated luxury spas incorporating elements of Ayurveda and spa.

India is becoming a popular travel destination for health, both traditional medical procedures and wellness activities. This is due to the high standards of treatments at very affordable prices. In the resort and hotel sector the main players are: Oberoi, Taj Hotels and resorts, Leela palace, Ananda, Hyatt, and Sheraton.

In the current scenario, day spas with wellness elements are doing better than wellness resorts or spa hotels. Traditionally massage and therapies have been very affordable and Indians are not used to pay for premium services. This would explain the success of Day Spas over resort and hotel spas.

A number of organized mobile spa services have also started mainly in the metropolitan cities like Delhi and Mumbai to provide spa services to homes of the interested people. India women in particular are used to having massage in their homes with therapists traveling several times a week. Mobile spa services are expanding rapidly due to this aspect.

Ayurveda itself is becoming increasingly popular worldwide and is finding its way into many western spas. One of the large driving factors is it is a cost effective wellness model for operators as staffing costs are affordable, practitioners are well educated and speak fluent English. The recent formation of the “Spa and Wellness association of India” is the first step in formalizing the growing number of spas in the country and they are striving to implement standards and benchmarking.

ECONOMIC CRISIS

The effect of recent economic crisis has been negligible with respect to the Indian Spa Industry with almost 600 spas slated to be coming up in the next couple of years. This is largely due to the fact the

SPA INDUSTRY BRIEFING: *India*

industry is still very much in its infancy and has several years before supply and demand stabilize.

Regular Spas continue with their spa visits, though the emphasis is more on basic therapies rather than the more elaborate ones. Spa retail is down as consumers are more careful with their money.

Contrary to expectations, the economic slowdown has been a boom for the city hotel spas and day spas reporting an increase of 15-20% in sales so far. This is due to business men traveling frequently internally and foreigners traveling looking for business opportunities.

PROJECTS

Only about 10% of the originally planned Spa projects are on hold. Mainly the much larger destination spa or wellness resort projects are the ones on hold because of a slump in the real estate business for lack of interested investors.

Northern India shows the biggest increase in the number of spas because of steadier economic growth followed by Mumbai in the west, Gujarat and Bangalore. Kerala still remains the destination for Ayurveda. The health ministry in conjunction with the tourism ministry has started the process of incorporating regulations for the spa industry with an aim to standardize spas ahead of the Commonwealth games in 2010. The spa industry is foreseen to benefit immensely from the influx of tourists during the games.



Oberoi Udaivilas

Most real estate developers have started incorporating luxurious spa into their gated condominium projects. Often international operators are being considered for these projects as it gives the project a sense of credibility which real estate developers constantly strive for in India. For example: Six Senses have been asked to develop a spa by the Jaypee group of builders for their ambitious 500 acres residential project in Delhi.

DESIGN

After the 'Kaya kalp' Spa based on designs from the Mughal era at the Oberoi hotel Agra, the trend is to set up spa based on themes from Indian history, mythology, astrology etc. Indians are very proud of their deep heritage and the wealthy Indians are happy to experience elements of their past. Foreigners obviously also like to experience part of this rich history. With many new spas in the west going for ultra modern designs, the appeal of these traditionally themed spas should not be forgotten as they become a real experience rather than simply a treatment.

CHALLENGES FOR THE INDIAN SPA INDUSTRY

- ◇ Lack of Standards
- ◇ Lack of Accredited Training Institutes
- ◇ Lack of Accredited Spas
- ◇ Lack of Uniformity in Traditional Treatments

Treatments differ, simple therapy like Ayurvedic Massage is done in different manner in different places, for example, Shirodhara is done at any time of the day, where as it is strictly contra indicated in the afternoons.

- ◇ No Avenue to address issues & grievances of the Industry.
- ◇ Lack of government support in promotion of industry except in few cases
- ◇ Lack of awareness in all strata's of the society
- ◇ Shady places working under the name of Massage parlor giving a bad name to the profession & Industry.
- ◇ Non-sharing, discreet & Orthodox attitude of some Ayurvedic Practitioners not wanting Ayurveda to be used in the spa Industry.
- ◇ Many Practitioners looking at Ayurveda as a Therapeutic Modality rather than Lifestyle Management Modality.
- ◇ Non Standardized products

SUMMARY

India is well poised to become a major player in the medical tourism/wellness market with spa coming along for the ride. There is huge potential for both internal business as well as international travelers searching for wellbeing and also looking for spiritual journeys. India is a country of contrasts and spa sitting alongside yoga gurus is very appealing to modern travelers.

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