



Industry Briefing Papers 2016

ASIA: INDIA

1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

India is a strongly developing country. The spa & wellness industry is growing in the same pace exponentially. Indian spa industries provide a promising outlook for the global spa industry.

India is currently the 10th fastest growing globally in Beauty & Wellness sector. The industry is poised to reach a size of INR 1,00,000 crores by the year 2015-16. The footfalls in the salons have not only increased but also the business of beauty is witnessing a revolution like never before. In Beauty & Wellness Industry by year 2022 well-being lifestyle is strongly taking place in the Indian citizen mindset, result of this wellness service providers are getting the positive outcome on their heavy investment. This is because of rise in consumer spending capacity, increase in availability of funds and expansion of spas and salons into tier-2 and 3 cities have been growth drivers for the wellness industry.

In the Beauty and Wellness industry in India, only 20% to 30% of the total market share is controlled by the organized players. The rest of the market is unorganized and fragmented with the presence of small and regional players.

Wellness tourism is still not promoted on strong a platform, as India is having a 5000 years old ancient ayurvedic and yoga heritage which is gift by our ancestors which can boost wellness tourism tremendously. The potential of wellness tourism systems, developed through centuries of wisdom, ancient civilization would be fully tapped.

Due to lack of knowledge about wellness industry and unheeding behavior of governing bodies regarding promotion of wellness tourism sector. Improper alignment with industry leaders to understand the real wellness activities thus the growth is impeded.

Predominantly, Wellness, Spa, Beauty, Fitness, Wellness tourism industry are five rising sectors that requires the maximum supply of skilled workforce.

2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

Spas:

Resorts spa is booming with proper wellness concept with heavy investment module. SPA has been increasing Many new thought process of spa has been opening. For example Kids SPA , Technology base concepts in the day spa, Wellness centers, , Salt Escape SPA which claiming that its is a First Salt Spa To Help you to Breathe Better! The numerous day SPA and SPALON (Spa and Salon) concept of spa has been opening every other day.

Beauty:

As the impact of western culture is rising the spending power of Indian households has increased in the past few years they are comfortable with spending surplus money on beauty and wellness services.

Beauty services at door steps (home services) concept is offered by big chains of beauty salon is also a big change in the beauty industry.

With the global and media exposure for many youngsters' today, looking good is equivalent to feeling good that's why they prefer spa therapies for the feel good factor. Teens, young and old people – all are giving more attention to their looks, and it has become prime factor in both personal and business growth.

Wellness Tourism:

Ministry of Tourism has drafted guidelines which addresses issues regarding availability of quality publicity material, training and capacity building for the service providers, participation in international & domestic Wellness related events, etc. for the wellbeing of India. As mentioned above wellness tourism can be strong selling key in India. It will be possible if government utilizes maximum expertise's of the wellness industry leaders.

Wellness Communities or Real Estate:

Most real estate developers have started incorporating luxurious spa into their 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 Spa have been asked to develop a spa by the Jaypee group of builders for their ambitious 500 acres residential project in Delhi. Same applies to the other real estate companies. They want to make sure SPA is the neighborhood concept and this can give them more mileage to sale their property.

3. Our theme this year is “Back to the Future.” What do you feel is your country's most significant contribution to what is now a global wellness economy?

Ayurveda stands for "Science of life or age" and is the traditional 5000 year old treatment for complete medical system in the world. Its roots lie in the ancient Indian

Civilization and the Hindu Philosophy, and has been an important influence on the development of almost all Medical systems.

Also yoga which is a commonly known generic term for the physical, mental, and spiritual practices or disciplines which originated in ancient India with a view to attain a state of permanent peace. Yoga focuses on holding physical postures that stretches the muscles and limbs. Yoga can be practiced purely for relaxation of the body and mind and can develop flexibility and strength at the same time.

A lot of international tourists come for ayurvedic treatment and for experiencing yoga retreats in India every year.

4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?

The challenges the spa and wellness industry faces today are numerous. Many of them are a consequence of the way the sector has evolved in recent years. Although spas becoming main stream are faced with many obstacles, future trends hint towards a more rapid process.

The major challenges faced by the Beauty & Wellness Industry are licensing, paucity of quality skilled & trained manpower, attrition, poaching and consequent high manpower costs , rentals of spas and salons in the Metro Politian cities, wrong practise of competition .

- i. That Cross - gender massage is the loophole which creates opportunity for many evil practices. However, there are many spas in India that offers cross - gender massage treatments to their clients fulfilling all the legal parameters. But a single unfortunate incidence degrades the image of overall spa industry in India. This exploitation and harassment makes the staff demoralized. Young and talented individuals and their parents hesitate to send their children to enter in this field although it has a lucrative career which is affecting the development of the wellness industry for the talented manpower. The guests (clients) start measuring the entire spa and massage parlors on same scale, therefore families confined themselves to visit spas and salons. Due to lack of awareness in all strata's of the society, shady places working under the name of massage parlous giving a bad name to the profession & industry.
- ii. The consolidated formal law or regulation for this industry in India is needed on the prior bases.
- iii. Another challenge is lack of conformity to quality standards across the Industry which restricts to let us project the image of India as a high-quality wellness destination.

- iv. Beauty & Wellness is a domain which employs more women than men and also presents them the scope to turn entrepreneurs in their own right.
- v. The current scenario, due to numbers has been increasing in the day spa, crisis has raised another problem: many spas have cut their costs dramatically without reducing their prices. This not only endangers consumer confidence but also jeopardizes customer loyalty towards our industry. It is essential to figure out what the client is looking for (relaxation, health, leisure, etc.), and to understand whether all these services can be offered under a specific spa model.
- vi. The single biggest challenge is the shortage of trained manpower. The Ministry of skill development is helping for skilled labor force but the industry is still not able to get skilled manpower due to lack of training institute in the spa. Lack of standards, lack of accredited training institutes, lack of accredited spas, lack of uniformity in traditional treatments, treatments differing,
- vii. 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.
- viii. SPA retail is down as consumers are more careful with their money but at the same time there is lack of awareness for the professional product segment. Hotel, Spas and Day spas reporting an increase of 15-20% in sales so far. This is due to business men travelling internally frequently.
- ix. Lack of Government support - Government should develop and promote medical tourism and wellness tourism separately.
- x. Industry is not working together, which is again a big challenges for the leaders, as everyone is working there - one end result is more than growth, grouping of associations is increasing. No avenues to address issues & grievances of the industry. Lack of government support in promotion of industry except in few cases.

5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.

In India well-being has been taught from child hood in the beautiful shloka, “Subham karoti kalyanam, arogyam dhana sampadah” meaning of shloka I pay my salutation (namaskara) to the light / lamp which brings auspiciousness, prosperity, good health, abundance of money and wealth, and the destruction of the intellect’s enemy)to make your mind, body and soul spiritual strong for well-being Social-Emotional Well Being is keeping person fit by all aspect. The Building Blocks for Early Learning of your life. The period of early childhood sets the stage for how well children view themselves, each other, and their world. Shared positive emotional experiences

between caregivers and children serve as building blocks for the development of social and emotional well-being of society. Incorporating the three principles of promotion, prevention, and intervention within a systems framework (child-parent-environment) will enable early childhood practitioners to encourage the emotional health and well-being of all children and families.

Well-being is a complex construct that concerns optimal experience and functioning.

Wellness not only consists of physical health, but emotional and spiritual well-being too. Wellness approach is useful in nearly every human endeavor. As a pathway to optimal living, wellness encompasses of health promotion and holistic health, and has seen a growth in "helping professions" including counseling and medical arts and practices. The concept of wellness has become a globally accepted phenomenon. Indian traditional yoga, interestingly, has become the favorite flavor and an importantly integral part of all wellness spas, centers. With the help of holistic wellness approaches that include yoga, meditation, ayurveda, homeopathy, pranic healing, chakra therapy, aura cleansing, and more, these centres offer packages like weight management, wellness bliss, yoga, ayurvedic rejuvenation, fitness and stress management.

Well-being includes physical health, but it also includes additional key aspects of our lives such as Emotional, Psychological, Mental and Intellectual health. Social and Community health, where there is a sense of belong, are often included. Spiritual health is also often inserted into the conversation, mind and spirit is used to demonstrate the scope of well-being. Well-being included overall state of man Financial health, professional, occupational, Environmental and economic well-being into the mix

For example, higher levels of well-being are associated with decreased risk of disease, illness, and injury; better immune functioning; speedier recovery; and increased longevity. Individuals with high levels of well-being are more productive at work and are more likely to contribute to their communities. Realizing the benefits of well-being on productivity in the workplace, many employer sponsored wellness program now give attention to the holistic needs of employees. Employers often provide training on dealing with stress, in and out of the workplace; lunch and learns on financial wellness; opportunity for community involvement and volunteerism and so on.

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