

EUROPE: *Turkey*

ECONOMIC CLIMATE

Negative

- Individual's shrinking disposable income affected membership sales. And most of the spas in the city destinations base their income on memberships.
- As the crisis hit, people cut back on luxuries, spa treatments fall into that category.
- We have seen a decline in the more expensive treatments in 2009.
- As in all our hotels we price membership in Euros, the strengthening of the currency at the end of last year affected new sales as well as renewals.

Positive

- The impact of the economic crisis affected people's health and stress levels increased. We have noticed an increase in de-stressing treatments in some areas.
- Due to increased competitive advertising among different hotels and spas people are more aware of what the word "spa" means and also its benefits and healing therapies.
- At least for Turkey, business seems to be picking up again.

STATISTICS

- Due to changes in the tourism sector and competitive advertising campaigns, people are choosing more natural spa holidays with holistic experiences - they are looking for hotels with different categories of spas, thermal springs, or holistic healing therapy spas to rejuvenate themselves.
- Maintaining a healthy concept of living has become an important factor in determining holiday destinations.
- Nutrition and healthy living becomes an integral part of the spa. The concept of healthy living is relatively new in Turkey and spas can contribute to the improvement of overall health by offering dietician advise, healthy eating, etc.
- Knowledge of spas has increased substantially compared to 2-3 years ago when people used to think of spas as only places for massage. Now it is a total concept of well-being of the mind, body, soul as well as total fitness.
- Sizeable and state of the art fitness and spa facilities have become a more and more important decision factor for hotel guests when they choose a hotel.
- Here in Turkey fitness is still an equally important factor to the success of a spa. So on top of revenue generated from treatments, there is an additional income level in that people are prepared to pay more for the guest rooms, knowing they have good spa facilities on property.
- Product sales are still very low
- The traditional Hamam treatment still accounts for almost 50% of treatment revenue.
- We still see a number of so called spas opening which are purely huge fitness centers, not offering much in terms of spa treatments or a spa feel.

SPA INDUSTRY BRIEFING: *Turkey*

- A lot of investments are done purely with local sources, not making use of international available know-how, technology, etc.

INNOVATION

- Many new concepts have been introduced, for example LPG machines for cellulite, laser treatments for skincare and Botox. Especially in Turkey, people are very technology addicted. If there is a new machine, or a new trend, people want to be among the first to try it and experience it.
- Spa management consultants have sprung up in many regions.
- Many traditional cosmetic companies have also ventured into the spa field offering new ranges of international spa products and spa therapies with training geared to hotels and spas.
- In our Amrita Spas in Izmir and Istanbul we have introduced Ayurveda in recent months and we hosted an Ayurveda workshop where an Ayurveda doctor came to participate and explain the benefits of Ayurveda to all our spa members - this has helped awareness and increases revenues for our Ayurveda healing therapies.
- On the fitness side, we have increased the number and variety of group classes to include Pilates, Step Aerobics, Spinning, Yoga, Taebo, Kinesis and Reformer, and Aqua gym.
- Private fitness training is an important factor in the success of any spa in Turkey.
- We have also introduced workshops on Reiki, Laughing Yoga and Diet & Nutrition to promote the awareness of health and wellness which is currently required by the local community.



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