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# The Perception of European operators toward Thai Spa and the “Thai Spa World Class Standard”

**This report was written as part of the project:**

Self Control and third party ceRtification; knowledge and application of the key procedure to implement voluntary and regulated requirements of the EU single market and building trust on Thai ProducTs and services with cultural Identity

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# **The Perception of European operators toward Thai Spa and the “Thai Spa World Class Standard”**

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## Foreword

In recent years we have witnessed a rising interest in the recognition of values of certain products with a specific cultural and geographical identity. When we talk about Geographical Indication (GI), we are referring to a system able to protect and transmit some products attributes which are indissolubly linked to well identified origin, culture, territory, and savoir-faire. Their growing success in terms of market presence (over 6000 products registered in EU, including food and agricultural products, wines and spirits but excluding handicrafts) and a number of sui generis regulatory frameworks or other more generic systems to formally protect GI (around 30 countries only at global level do not have any formal protection system), gives a clear perception that something has been defined to preserve our diverse cultural heritage.

Geographical Indication products are natural opponents to generic undifferentiated goods, to a face-less globalization, to a world market competition purely based on economy of scale, volume and uniformity; that is to say: in contrast with products determined by sheer global price competition.

Food and agriculture products with a cultural identity, are showing a huge potential not only in their native countries where the food industrialization paradigm has tried to sweep away a thousand years of food culture in the name of profits, but also in diverse and tradition-based environments, where consumers are increasingly looking for “original” quality of well renowned products. According to a study by the European Commission’s Directorate-General for Agriculture and Rural Development (2008), it is estimated that 30% of European geographical indication products (excluding wine and spirits for which the percentage is even higher) are exported. The study shows a rise in European GI food products exports both in volume (+9% between 2005 and 2007) and value (+17% in the same period).

The willingness to preserve our know-how and history, oral and immaterial heritage, is neither new nor a sole prerogative of the food sector. Since 1972, UNESCO started working on the idea of “World Heritage” (WH) sites, which is

an official denomination of a place such as natural or cultural places with special physical or cultural significance. The sites must have “outstanding universal value” such as uniqueness, irreplaceable nature and satisfy certain precise criteria such as the site: (iii) “bears a unique or exceptional testimony to a cultural tradition or to a civilization which is leaving or which has disappeared” or (V) “is an outstanding example of a traditional human settlement, land-use, or sea-use which is representative of a culture, or human interaction with the environment especially when it has become vulnerable under the impact of irreversible change”. It is impressive how these criteria are strictly related to the concept of geographical indication.

GI and World Heritage site, are two official denominations that are applicable to different categories, they cannot be directly compared but they both represent an effort to protect and valorize part of our culture, history, unforgettable capacity to invent and interact with nature and other human beings.

This study is part of the EC-co-financed project “**SCRIPT: Self Control and third party certification; knowledge and application of the key procedure to implement voluntary and regulated requirements of the EU single market and building trust on Thai Products and services with cultural Identity**”. In turn, the SCRIPT project concept came from over three years of investigations, practices and field experience on geographical indication development in Thailand (in the frame of a former EC co-financed project names: PRO\_GIs: Intellectual Property Right extension & Geographical Indications protection for the benefit of EU-Thailand Trade, ended in 2010).

As project director of the PRO\_GIs, I was impressed to learn and see how Thailand has strong and diversified traditions, taking part of its strength from the capacity to deal with, process and use agriculture products such as fruit, vegetables, herbs, animals (including silkworms for sericulture). While part of Thai agriculture products has been used to elaborate a peculiar culinary tradition, herbs blended with ancient culture of medicine, massage and meditation, has resulted in a unique healthy treatment and practice: the worldwide known Thai Massage (in Thai language: “Nuat Phaen Boran” literary, the ancient manner massage).

The founder of Thai massage is said to have been Shivago Komarpaj over 2500 years ago but probably its birth is more complex and lies in a combination of

different cultures and influences from India, China and South –East Asia. The practice, as it is known today, is likely to be a 19<sup>th</sup> century synthesis of various healing traditions established in Thailand.

While staying or traveling to Thailand, I experienced for the first time the Thai Massage: I am not an expert of massage techniques nor SPA treatments, but I immediately realized that I was leaving a unique experience. Investigating and trying to imitate it on some unwary friends, I concluded that there were some magical, inimitable and unique ingredients that could elevate it to the high rank of “World Heritage” practice, a kind of “treatment with Geographical Indication” or less pretentiously, a unique practice with strong cultural identity.

Looking closer at the three main pillars of GI, it surprises to see how their combination is verified also in the case of Thai Massage: *Territory* which determines products characteristics to be used to perform the massage and to create the ambience which is part of it (herbs, aromatic oils, etc), *Historical memory*, local and very peculiar expertise and local knowledge are blended into the products resulting in a singular practice thanks to the *Human capital* that brings the local savoir–faire and translates the historical memory in creation and performance. The world wide Thai massage reputation, adds another necessary ingredients to its uniqueness. According to the interviews presented in this study: “*Thai massage is perceived as a unique form of energy bodywork (.....)*”. “*(.....). The respondents mentioned that Thai SPA is unique in wellness treatment because its techniques are part of Thai culture and way of life transferred from generation to generation*”. Furthermore in a talk with a psychiatrist in Bologna, Italy, the researchers concluded that: “*Thai SPA is valued for its genuine and authentic tradition*”.

Thai Massage is nowadays performed in Thailand and abroad and in a great variety of locations and places ranging from simple Day SPAs to more sophisticated Destination SPAs, Medical SPAs, etc. Thai Massage is renowned as having a holistic approach to wellbeing and health by addressing the five senses (e.g. through use of oils and aromas together with the location typically decorated in Asian Style, music to accompany the massage itself etc.); therefore a key relation exists between the art of performing massage and the context in which is performed. The challenge to protect and promote Thai massage, is strictly related to the possibility to define precise standards that uniquely define how to perform it in a wide meaning: this is why Thai SPA World Class Standard represents a consistent attempt to preserve, protect and valorize Thai massage in the world

market. Thai Standard encompasses several sections regarding SPA establishment, operator characteristics, equipment and specific standards related to the art to perform Thai massage in accordance with tradition such as masseurs training and skills, products to be used, provision of Thai spa service, etc.

Quoting Mariann Fischer Boel, “When a product (in our case a practice) acquire a reputation extending beyond its production region, it can find itself in competition with product (services – practices) which pass themselves off as the genuine article and take the same name. This unfair competition not only discourages producers, but also misleads consumers”. This is especially true when dealing with Thai massage, which according to the present research, is struggling against practitioners claiming its reputation and providing uncertain practices; and in certain cases hiding erotic massages and prostitution. As study authors are saying within this study: “All the interviewees pointed out the difficulties to establish an image of respectability and seriousness (.....)”. “(.....) further market penetration and the attraction of new customers depends on the capacity to establish an earnest and serious image”

Recalling the previous parallelism with geographical indication rules defined by EU (Council Regulation (EC) No. 510/2006) and Thai Act of Protection of Geographical Indication, one of the preliminary and most important step for their protection, consists in defining precise product specification. It consists in detailed and *checkable* identification of the product and a set of technical information necessary to define it. Thanks to the Thai Ministry of Public Health, Thai SPA Association and other key stakeholders, a key step in this direction has been made, such that: “Thai SPA World Class Standard” has been recently set out.

Defining product specification is just one of the milestones to ensure culture preservation and to correctly inform consumers about product or practice authenticity. *Verification, controls and certification* performed by professionals and accredited bodies, is an additional key procedure foreseen under articles 10 and 11 of the EC Regulation. This is necessary to verify and certify that producers/processors/providers are respecting what is stated in the product specification and must occur before placing the product/service on the market.

While in the EU we have a consolidated approach to those practices, in Asia we are moving towards a progressive familiarization with those tools, but a bit of confusion still exist at this regard. Differences among accreditation, certification,

internal and external control procedures are still weakly perceived among certain stakeholders. Most importantly, the teamwork necessary to develop and implement a reliable control and certification system is often substituted by few centralized organizations engaged in defining the standard, controlling it and in some cases implementing or supporting their implementation.

Offering adequate guarantees of objectivity and impartiality during all verification and certification processes is still a challenging task addressed by SCRIPT project in cooperation with Thai SPA World Class Standards key stakeholders.

I believe that a reliable system for control and certification of Thai SPA World Class Standard, which includes Teamwork with well defined and finite competencies distributed among selected players, will enhance their respectability and reliability in front of international markets (used to high level accredited quality systems) and increase Thai service providers protection by ensuring the involvement of key stakeholders within the limits of their competencies.

The SCRIPT project and its team, aims to give its own contribution for the formal recognition, protection and valorization of Thai Massage and SPA world Class Standard as a practical case which could stand for all those practices, treatments, services with cultural identity which are trying to establish themselves as a uniquely accepted Cultural Heritage.

Mr. Giovanni Galanti  
SCRIPT Project Director



## Executive summary

Europe is the biggest spa market in the world in term of number of spas and revenues. In 2007, it had approximately 22,607 spas and generated revenue of 11.9 billion euro. Spa facilities in Europe comprised 14,933 day/club/salon spas; 4,297 hotel/resort spas; 1,202 destination spas and health resorts; 913 medical spas; and 1,262 other spas. Day/club/salon spa is the most common type of spa in Europe (66%) followed by hotel/resort spa (19%) and destination spa and health resort (5%) respectively. However, in terms of revenues, hotel/resort spa and destination spas/health resorts accounted for a much larger share of the market as compared to their opposite numbers. Day/club/salon spas account for 4.89 billion euro (41%), while hotel/resort spas and destination spas/health resorts together account for 6.17 billion euro (52%) (Global Spa Summit, 2008). Among them, the three largest countries in terms of revenue - Germany, France and Italy, accounted for over 46% of industry revenues or 5,422 million euro (Global Spa Summit, 2008). Recently the main popular trends are indigenous treatments from various regions and countries, for instance the concept of “East meets West”. This spa program combines various philosophies in one program such as Ayurveda from India, Thai massage from Thailand, or Traditional Chinese Medicine from China, etc (Spa Finder, 2006), hence, it clearly shows great opportunity for Thai spa.

**In the Thai style spa, massage plays an important role.** ‘Thai massage’ is available and well-known in Europe as a traditional massage that helps to relax and release stress from daily life-style. Especially ‘Thai health massage’ gets more interest from customers and operators because of outstanding performance that is able to increase wellness and external beauty of customers; and is totally different from European beauty massage in general. However, **possible misunderstanding and confusion between traditional Thai massage and the so-called “Erotic Thai massage” is the most serious issue** that misleads customers and operators to perceive Thai traditional massage in a sexual connotation. This was mentioned as a very serious issue in every country surveyed and it deflects the good image and even reduces the real perceived value of ‘Thai traditional massage’. **The discrepancy in service quality is also mentioned as hindrance to Thai spa** as well.

The situation of Thai spa in Germany and France are similar, there is high development of Thai massage and spas due to the establishment of Thai immigrant communities. In Germany the ‘German Thai Spa Association’ (Thai Spa Vereinigung Deutschland e.V.) has been established and they are collaborating with the Thai Ministry of Public Health to establish a spa standard among the members. The respondents who have operated Thai spa in both countries are more willing to adapt Thai Spa World Class Standard in order to cope with the problems mentioned before. Whereas in Italy, even though Thai massage is already well-known, there is a lower development and lack of knowledge of Thai spa; and consequently lower demand from the market for such kind of services.

**A huge difference between the perception of people** that never have had experience with Thai spa massage, and others who experienced Thai spa treatment exists. People who experienced Thai spa and massage basically have a **very good perception of these traditional techniques**. They mentioned that an important aspect which distinguishes Thai spa tradition from European treatments is: **its holistic approach to wellbeing and health; Good service, friendliness and ambience; and genuine and authentic tradition**. While spa businesses focused on a western type spa are **not familiar with Thai spa practices and don’t show much interest in it either**.

On the other hand, Thai spa faces **difficulties to establish an image of seriousness and respectability**. The image of Thai spa and massage is damaged by confusion with sex-related services. This is the most important issue that has to be addressed to improve respectability of the business and to allow further market penetration. It is also important to establish a quality standard for education and training of Thai masseuses to reduce **differences in the qualification of the employees**. **Cultural distance and languages** are considered as barrier for Thai masseurs as well. **The price positioning of Thai spa has not been considered adequate by German interviewees**. Thai Spas and massages are generally considered cheap, compared to the quality of service they provide, which affects the position of Thai spa in the market. In the interviewees point of view, level of price somehow could be used to screen customers and it may represent a signal of the quality of spa, helping the customer to distinguish “real” Thai spas from those just offering “erotic” massage. Authors concluded that information and promotion activities giving appropriate visibility and understanding of Thai traditional massage and the related Thai Spa World Class Standard may represent important

leverage to avoid possible misunderstanding and confusion. In addition fair pricing policy should be considered as an important asset to compete on the SPA market in EU and taking into account the very nature of Spa industry which in accordance with the view of Andrew Jacka, President of Thai Spa association: *“There is more mindfulness the while our industry may well be based on luxury pampering, we are in fact part of the bigger health care industry”*

**Regarding to Spa Standard**, in general, **starting a spa business requires the owner/manager to comply with service business regulation and health and sanitary regulations in force** both in the country and in the local area. In addition to the compulsory standard, some spa operators may choose also to apply more stringent quality assurance voluntary standards to guarantee the customers that they will get high quality services, so that, they could be differentiated from other spas. At the moment there are very few **voluntary spa standards** available in the global market. In Europe the most important are: the **‘EUROPESPA’** standard from European Spa Association (ESPA) and **the Best Health International (BHI) standard Certification** that is awarded by TÜV Rheinland as standards that can be applied everywhere in Europe. In France, the French certification body “Spas de France” developed a voluntary certification that guarantees the quality and reliability of spa services. In Thailand **‘Thai Spa World Class Standard’** has developed in 2008.

#### ***Comparison between European and Thai spa standards***

The **‘EUROPESPA wellness’** quality seal uses the following areas as the evaluation criteria: (1) Management system and conformity; (2) Procurement and provision of water and peloides for wellness; (3) Wellness applications; and (4) Accommodation & Environment. There is no classification of spa level according to this standard. **‘Thai Spa World Class Standard’** evaluates spas according to 5 standard sections: (1) Service Quality, (2) Skill Staff, (3) Tool and Equipment, (4) Organization & Management Quality, and (5) Ambience. The quality of health spas is classified into three levels on the basis of the score achieved: Platinum, Gold, and Silver. In conclusion, EUROPESPA standard focuses on hygiene and safety issues, general wellness infrastructure and wellness service, which are the main issue of this kind of service; whereas Thai Spa World Class Standard focuses on service by proposing ‘Service Quality’, ‘Skill Staff’, and ‘Ambience’ as additional qualification to the compulsory sanitary and health regulation from MOPH.

Both of the standards are valid for three years with auditing and inspecting to control the quality of spa. While EUROPESPA standard specified that there is an anonymous check made by a professional auditor about two times in three years,

Thai Spa World Class Standard did not specify the control and inspection time and period. However, in Thailand, health spas must be legally operated or be established in accordance with all Thai laws, especially ‘the Service Enterprises Act, B.E. 2509 (A.D. 1966), amended in B.E. 2551 (A.D. 2008)’ which is the one year certification, therefore, every spas in Thailand will be checked and evaluated every year at least for the health and sanitary aspects.

#### *Perceptions toward Thai Spa World Class Standard*

**‘Thai Spa World Class Standard’ is unknown to most respondents** except some persons who are members of German Thai Spa Association. Nevertheless, the Standard was perceived as **an added value for the Thai Spa**, since clients are looking for a certification to be confirmed in their choice of quality and type of treatments. In addition, they believe that this standard will help to establish good business image and differentiate them from other Thai erotic massage. The founders of Thai Spa World Class Standard should be aware that **any standard applied to Europe has to comply with local sanitary and health standards as well**. In addition to compatibility with local law and regulations in Europe, **the standard should strive to qualify the excellence of Thai spa service**. **Certification and grading procedure could be revised**. In the initial stage when introducing the Thai Spa World Class Standard, the grading system (platinum, silver, gold), should be avoided since it may generate confusion among operators and customers. A single quality label for Thai spas is probably more easily applicable by the spa and more easily identifiable by the users. Furthermore, **investing in promotion of the Thai Spa Standard is crucial**. Information provision and high level of communication are necessary to promote the standard and create consumer awareness.

#### *Recommendation for establishing Thai Spa World Class Standard in Europe*

##### **Role of industry stakeholders and standard developers/managers**

- An accurate analysis and continuous update of a regulation database and continuous review of new laws is necessary for a successful introduction of the standard in each country.
- The inspection and control activities are crucial to maintain integrity of the system, to generate trust and to make the label able to add value. Therefore, adequate investments in system enforcement and in the inspection activities are fundamental for success.
- Improving networking and collaboration between Thai and European governmental bodies, and between Thai Spa Association and European Spa Associations, as well as with the local ones such as German Spa

Association, French Spa Association, etc. and local Services and Tourist promotion sectors of each country could help to promote the Thai Spa World Class Standard and establish a good image of this certification.

- Investments in communication, promotion and advertising should be sufficient to achieve the objectives through appropriate actions such as promoting it through international trade fairs, associations and media.

### **Role of Thai Royal Government**

- Education and training. Qualification of persons who will hold masseur certification should be carefully supervised and validated.
- Endorsement of highly qualified personnel so as to establish a serious business image for Thai spas and maintain the service quality of Thai masseurs.
- Control. State Inspection and Verification bodies could be involved in the certification process, inspecting/auditing a sample of spa according to the standard as well as the certification bodies accredited to issue the certification.
- International mobility agreements. Mutual recognition of qualifications between Thai government and European government and discussion about 'health massage certification' would be crucial, since Thai health massage is considered to be an outstanding service which could differentiate Thai spas from European ones and the consumers given added-value.
- Networking and support to SMEs. Government bodies can promote networking through co-financing and attending international spa trade fairs to collaborate in the promotion of the Thai Spa World Class Standard.
- Research. Alternative medicine and traditional massage are experiencing increasing trends, therefore, its features should be tested through funding medical research and clinical trials should be explored.

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## 1. Introduction

The 'Thai spa' industry is rooted in a long tradition of healing and promoting wellness through Thai massage and herbal medicines. It is embodied in Thai culture and indigenous wisdom. Thailand has attracted visitors from all over the world, who appreciate not only the excellent medical and health care but also enjoy the experience of Thai spas and traditional Thai massage, as well as the salutary effects of Thai herbal products. All together this makes Thailand a rising star in health tourism. From year 2000 the Thai spa sector experienced a strong growth and in a relatively short period Thailand has become known as the 'Spa Capital of Asia'.

A study undertaken by Intelligent Spas reported a growth of 64% for the period 2000-2002. Between June 2001 - June 2002 some 230 Thai spa operators attracted a total of 3.3 million spa users, out of which 2.5 million, or 79 per cent of the country's total spa clientele, were overseas spa patrons contributing a total of US\$85 million to Thailand's foreign exchange earnings (Wisutwet, 2005). In 2009, there were 743 spas operating in Thailand (a 202% increase in number from 2002) and are expected to generate 9.1 billion baht or 0.19 billion euro in revenue (Intelligent Spa, 2009). The Thai Spa Association reported that Thai spa has grown on average over 25% annually and 154% during 2002-2007; with anticipated growth of 6% in 2008; 7% in 2009; and forecast growth of 12% and anticipated 10% for 2010 (Jacka, 2010). However, Intelligent Spa (2009) reported that "Thai spas experienced a drop in revenue during 2009 and the number of visits and employment has remained relatively stable". Whilst this is encouraging, "a number of key benchmark ratios are forecast to decline". Therefore, spa operators, suppliers and consultants need to find new approach to help them successfully compete in the global market.

The Royal Thai Government realized that to sustain the growth in spa industry, it is important to offer assurance to Thai spa guests of the safety, hygiene and service quality, so as to build consumer confidence and trust in the services offered (Wisutwet, 2005). Therefore, under the mission of the Ministry of Public

Health, they established two sets of quality standards to Thai spas and spa operators:

- Standards dictated by legislative provisions as reflected in the certification standards stipulated in the MOPH Ministerial Announcement dated 21 April 2004 and
- World-class standards as defined by internationally recognized convention and ‘best practices’.

While compliance with the former is mandatory, since it is required by Thai law for all spa operators in the country, the latter is a voluntary standard that allows Spa operators to certify their ability to deliver a higher quality service (Wisutwet, 2005).

The ‘Thai Spa World Class Standard’ is expected to give value-added to Thai spas obtaining this certification, since it proposes ‘Service Quality’, ‘Skilled Staff’, and ‘Ambience’, in addition to general sanitary and health regulation. It stresses the strength of Thai spa as it offers service and hospitality with the friendly and caring nature and gentle ways of the Thai people, which are important traits and priceless assets for any spa operation. Hence, it may enhance the competitiveness of Thai spa in the world market.

However, to introduce the ‘Thai Spa World Class Standard’ in countries other than Thailand needs close examination since this standard is quite new and is not known in the international market. There is still a lack of available knowledge to assess the potential of this standard in the international market, especially Europe, which is the biggest market of the spa industry. Therefore, this study is the first step to explore the interest and attitude of spa operators in Europe to adopt ‘Thai Spa World Class Standard’. The study is focused on Germany, France and Italy, which are the biggest spa markets in Europe from a business perspective. The study also performs a general comparison of the ‘Thai Spa World Class standard’ with European Spa Standard on a technical perspective, in order to explore the possibility to use the ‘Thai Spa World Class Standard’ to foster the competitiveness of Thai spa in European market.

This study aims (1) to explore the interest of European spa operators to adopt Thai spa world class standard in Italy, France and Germany, and (2) to explore the

potential and the barriers to adoption of Thai spa world class standard in Italy, France and Germany.

The study takes the form of exploratory research in order to define and gain insight in the interest of European operators toward Thai Spa World Class Standard. A qualitative approach is selected to study this particular topic in depth since we are in the initial stage to introduce this standard to the market (Myers, 2009). The personal in-depth interviews with spa operators are structured as conversation-like dialogues according to a semi-structured interview outline via telephone (or face-to-face if possible). Questions are open-ended to enable the respondents to raise topics or issues which were most salient to them. The information collected from the interview was processed using a content analysis approach. The conclusions are drawn from different points of view of the respondents in an attempt to assess the potential of and barriers to Thai Spa World Class Standard in the EU market, in order to develop appropriate managerial marketing strategies to introduce Thai Spa standard in the EU market.

The remainder of the study is organized as follows. In Chapter 3, the research methodology is described. In Chapter 3, an outline of the background and a short discussion of the most relevant literature is provided. Chapter 4 offers results of the analysis and the final chapter presents conclusions of the study.



## **2. Methodology and data**

The main purpose of this study is to explore the potential and barriers of the “Thai Spa World Class Standard” in the EU market (Italy, France and Germany) for further development of the market for Thai spa in Europe. The target groups are spa operators. Given the type of target group and information to be obtained, an exploratory research approach is adopted in order to define and clarify problems, gather explanations, and gain insight into topics of interest (Hair et al., 2003). The research methodology applied is qualitative to deal with complexity and the rich diversity of operators perceptions (Myers, 2009).

The research procedure is composed of four main parts: (1) secondary data collection, (2) survey design, (3) interview procedure, and (4) data analysis and extrapolation.

### ***2.1 Secondary data collection***

Secondary data were collected through two different sources: (1) scientific literature (e.g. Scopus, Ingenta connect, Science direct, Springer Link, AgEcon Search, Emerald Insight, Wiley Interscience, SAGE Journals Online, etc.) and (2) others (e.g. Global spa summit, business reports, and the Internet) in order to gain background information of this topic and possible contacts in the business. Statistical data were collected mainly on business reports. Information and data collected in this way were used to design the following part of the study and to prepare the background overview provided.

### ***2.2 Design of the qualitative study***

The study is designed to gain information from EU operators and spa standard experts regarding to the Thai spa standard. Since exploratory research studies do not try to collect all representative samples but rather to retrieve information from persons who have knowledge and might be able to highlight the relevant problems or issues on a specific topic; hence, purposive non-stochastic sampling was applied to recruit participants in this study (Trochim, 2006). In addition, snowball sampling procedure was also applied when an interviewee recommended other

persons who might potentially be interviewed. The interview guideline was also designed for semi-structured interview in this way.

### **2.2.1 Recruitment of interviewees**

A possible list of European operators was created using a convenience sampling method on the basis that those listed are expert and professional practitioners in the spa sector. Sources of the list were personal contacts via the Franco-Thai Chamber of Commerce, Thai Trade Office (Milan), University of Bologna, Bioagricoop srl, and the Internet. The list included persons who interviewees recommended that might be consulted. Furthermore, the researchers also contacted an expert in European standards from TÜV Italia to obtain additional information regarding European spa standard compared to Thai spa standard.

The criteria to select the interviewees are: spa operators who have knowledge or experiences in spa standard (e.g. EUROPESPA wellness, national standard, local or private standard).

The complete list of selected potential key informants comprised 31 contacts in Italy, 25 contacts in France, and 27 in Germany. The potential informants were contacted by personal connections via email and telephone. The researcher explained the background of the research, aims, addressed terms of confidentiality, and asked for cooperation. After the enterprise agreed to give information, appointments were set up and interviewees were asked for permission to record the conversation. In the end, six participants who agreed to contribute to this research were from Italy (four persons- two spa operators, one expert in quality management of wellness industry and one expert in service standards certification), France (two persons), and Germany (two persons) (please find contact details in Annex II).

The details of sectors and activities of the interviewees are shown in Table 1.

**Table 1. Profile of key informants and companies**

<b>ID</b>	<b>Company</b>	<b>Interviewee</b>	<b>Sector</b>	<b>Location</b>	<b>Activity</b>
1	ITA-SPA-01	Owner	Thai Massage & Spa	Italy	Different types of Thai massages; currently developing towards Spa
2	ITA-SPA-02	Manager	Private wellness center	Italy	Different types of spa activities: cosmetic spa; traditional wellness techniques with the use of thermal pools; and physiotherapy sector
3	Dr.Roberto Ardizzi	Consultant and Auditor	Quality management of wellness industry	Italy	Consultant, Auditor, Quality certification and Marketing
4	TÜV Italia	Division Manager	Spa certification expert	Italy	Certification body and training center
5	FRA-SPA-01	Owner	Thai Massage & Spa	France	Different types of Thai massages; Spa; Training School in Thai Massage
6	FRA-SPA-02	Owner	Thai Massage & Spa	France	Different types of Thai massages; Spa;
7	Andaman Spa Duisburg	Owner	Thai Massage and Spa	Germany	Different types of Thai massages; currently developing towards Spa
8	Lanai Thai Massage Minden	Owner	Thai Wellness Massage & Spa	Germany	Different types of Thai massages and Spa

Source: interviews with operators.

Note: In a qualitative research usually the number of interviews is not designed to achieve representativeness, but to ensure a diversity of opinions from persons who have knowledge and might be able to highlight the relevant problems or issues on a specific topic (Trochim, 2006). The researchers ensured the inclusion of different types of operators including: spa operators, certification body and a representative from tourism and services industry.

### **2.2.2 Interview guideline design**

A semi-structured interview guideline was designed to provide the researcher with pre-formulated questions about the important issues that are expected to be discussed during the interview. The core information would be collected through a series of open-ended questions introducing wide topics and inducing the informant to raise salient issues which he or she thinks are important and relevant to the topic of interest during the conversation (Myers, 2009). The interview guideline was designed to support the interviewer to ensure that the conversation covered all objectives of the research. It was not necessary to direct the conversation sequentially according to the interview guideline but rather to continue it fluently and flexibly according to the response of the informants.

The key points have been defined as follows: characteristics of Interviewee's business; degree of involvement and familiarity with Thai spa; Degree of involvement and familiarity with spa standard (e.g. EU/private standard) through knowledge or experiences; Attitude toward spa standard; Knowledge on Thai Spa World Class Standard; Attitude toward Thai Spa and Thai Spa World Class Standard. The interview guideline is shown in Appendix I.

### **2.3 Interview procedure**

The personal interviews were administered during the period of March-April 2011 and took the form of semi-structured interviews. The interview guideline (Appendix I) was sent to participants in advance. The interview aimed to build a "conversation-like dialogue rather than asking questions that impose categorical frameworks on informants' understanding and experiences" (Arnould and Wallendorf, 1994; Knight et al., 2007).

Interviews ranged 30-60 minutes and in most cases were conducted in native languages of those countries (Italian, French and German). During the conversation the interviews were recorded (if this was permitted) and the interviewer took note of important information and observations.

### **2.4 Data Analysis and extrapolation**

Data analysis and interpretation was performed through content analysis of the interview transcription and minutes so as to identify important themes and pattern. Analysis was carried out in 4 steps:

**1) Summary Report:** Summary reports of each interview were written in English immediately after conversations. These reports comprised the characteristics of

informants' businesses and the most relevant perceptions and ideas that emerged during conversation, together with specific comments.

**2) Validation of summary reports:** A preliminary version of summary reports was submitted to the interviewees for “checking how accurately participants’ realities have been represented in the final account” (Cresswell and Miller, 2000, Knight et al., 2007) in order to establish credibility of the results (Lincoln and Guba, 1985; Knight et al., 2007). Their comment and additional information were included into the complete version of interview summaries.

**3) Transcription:** Tape-recorded interviews were transcribed and eventually translated into English. Non-verbal communication was not considered in this step. Comments were coded on the transcripts using different text colors and marginal keywords in order to identify important themes and patterns (Coffey and Atkinson, 1996; Knight et al., 2007). Additional information, participants’ quotes and comments from transcripts were used to perform a content analysis in the following step.

**4) Content analysis:** The information from the summary reports together with transcription were analyzed through content analysis. The essential objective of a content analysis is to describe the phenomenon and present the most interesting elements arising from each interview in order to gain an extensive overview of informants’ attitudes toward the topic. The researcher emphasized important elements by highlighting the direct quotes from participants. All key aspects and issues raised by key informants were highlighted in this analysis regardless of the number of informants with similar ideas.



## 3. Background

### 3.1 Global spa industry

The term “spa” is claimed to be an acronym for “*salus per aquam*” or health through water. J. Paul De Vierville traces the origin of the word spa from Latin verb *spargere*, which means to pour forth, and later became the proper name of a town in Belgium famous for its healing mineral springs (De Vierville, 2003; Frost, 2004). Intelligent spas define spa as "a business offering water-based treatments practiced by qualified personnel in a professional, relaxing and healing environment" (Intelligent spas, 2007). We could say that basically the spa treatments are based on authentic water-based therapies. However, spa services recently are not related only to healing through water but also wellness and relaxation. Church and Robertson (1999) said that spa service is a preventive program to improve overall health by increasing physical exercises, improving nutrition and addressing stress (Church and Robertson, 1999; Langviniene and Sekliuckiene, 2009). This is probably one of the reasons why the spa industry has played an important role in leisure. (Monteson and Singer, 2004; Langviniene and Sekliuckiene, 2009).

#### 3.1.1 Spa types

Nowadays the spa industry is classified into several types according to main purpose and activities they hold. There is not any clear European law regulating the sector able to differentiate among well-being centres, wellness, Spas, beauty farms, *Terme*, health clubs, or fitness centres. Global Spa Summit classified spa services into 5 categories (Global Spa Summit, 2007):

- 1) **Day/Club/Salon Spas** – offer a variety of spa services (e.g., massage, facials, body treatments, etc.) by trained professionals on a day-use basis. Club spas are similar to day spas, but their primary purpose is fitness. Salon spas are also similar but their primary purpose is beauty services.
- 2) **Destination Spas and Health Resorts** – offer a full-immersion spa and wellness-based activities that all guests are able to participate. They provide various spa and body treatments **programs** such as fitness

activities, healthy cuisine, educational classes, nutrition counselling, weight loss programs, preventive or curative medical services, mind/body/spirit offerings, etc.

- 3) **Hotel/Resort Spas** – similar to a day spa, but the spa facility is located within a resort or hotel property. Unlike destination spas, spas services are typically paid for on an *à la carte* basis, and meals are not included. Spa treatments and services complement other activities provided there.
- 4) **Medical Spas** – spa facilities are operated under on-site supervision of a licensed healthcare professional. They provide comprehensive medical and/or wellness care combining with traditional or alternative medical therapies and treatments.
- 5) **“Other” Spas** - This category encompasses all other spas that are not captured by the categories described above: Historically-/Culturally-Based Spas, Mobile Spas, Single Service Spas, Cruise Ship Spas, and Mineral/Hot Springs Spas. In Italy there are *Terme* and in France *thalassothérapie* or *cure thermale* that are based on therapeutic benefits of water and are strictly regulated by law. In Germany you can find so called ‘Spa towns’ – in German *Kurort* or *Heilbad* – where different kinds of medical treatments are offered. Also in Germany the certification as a Spa town is strictly regulated by law; the title ‘*Kurort*’ is given by the regional governments. The greater part of these Spa towns can be easily detected because their town name starts with the word ‘Bad’, like for example *Bad Dürkheim*, *Bad Reichenhall* and so on.

### 3.1.2 Global spa market

Considering economic impact of spa industry, the global spa industry generated economy of 39 billion euro from core industry and additional of 125.8 billion euro from spa-enabled industry, as a total economic impact of 242 billion euro in 2007 (Table 2) (Global Spa Summit, 2008). It is worth highlighting that although the spa market is vast; it is deeply fragmented by spa types (Cohen and Bodeker, 2008).

**Table 2. Market size of the Global Spa Industry in 2007 (billion euro)**

<b>Spa industry</b>	<b>Market size (billion euro)</b>
<b>Core Spa Industries</b>	<b>39.03</b>
Spa Facility Operations	30.29
Spa Capital Investments	8.41
Spa Education	0.20
Spa Consulting	0.05
Spa Media, Associations, & Events	0.08
Spa-Branded Products	n.a.
<b>Spa-Enabled Industries</b>	<b>125.76</b>
Spa-Related Hospitality & Tourism	68.62
Spa-Related Real Estate	57.14
<b>Total Spa Economy</b>	<b>164.79</b>

Source: Global Spa Summit (2008)

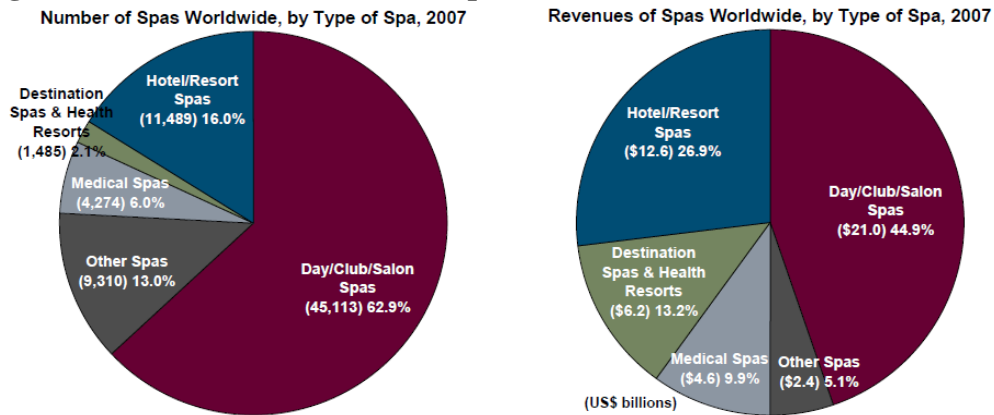
When considering the numbers of spas operating around the world (Table 3, Figure 1), there are approximately 71,762 spa operators in 2007, comprising: 45,113 day/club/salon spas; 11,489 hotel/resort spas; 1,485 destination spas and health resorts; 4,274 medical spas; and 9,310 other spas. Day/club/salon spa is the majority in the global market (63%) following by hotel/resort spa (16%) and destination spa and health resorts (13%) respectively. However, in terms of revenues, hotel/resort spa and destination spas/health resorts accounted for a much larger share of the market as compared to their opposite numbers due to their higher average revenues per facility than day/club/salon spas. Day/club/salon spas account for 13.59 billion euro (45%), while hotel/resort spas and destination spas/health resorts together account for 12.16 billion euro (40%) (Global Spa Summit, 2008). Hotel/resort spas are more and more chosen for the opportunity to socialize with other customers while somebody is taking care of your well-being in a relaxing atmosphere.

**Table 3. Global Spa Facilities by Type in 2007**

<b>Spa types</b>	<b>Estimated total number of spas</b>	<b>Estimated total spa revenues (billion euro)</b>
Day/Club/Salon Spas	45,113 (63%)	13.59 (45%)
Hotel/Resort Spas	11,489 (16%)	8.15 (27%)
Destination Spas & Health Resorts	1,485 (13%)	4.01 (5%)
Medical Spas	4,274 (6%)	2.98 (10%)
Other Spas	9,310 (2%)	1.55 (13%)
<b>Total</b>	<b>71,672 (100%)</b>	<b>30.28 (100%)</b>

Source: Global Spa Summit (2008)

**Figure 1. Number and revenues of spas by type in 2007**



Source: Global Spa Summit (2008)

Considering the spa industry in different continents (Table 4), we find out that Europe, North America and Asia Pacific account for over 90% of industry revenues or 28 billion euro in 2007. Among them, the five largest countries in terms of revenue (United States, Japan, Germany, France, and Italy) accounted for over 55% of industry revenues or 16.90 billion euro. The study of Global Spa Summit (2008) indicated that 39 per cent of global spa revenues are generated in Europe (Global Spa Summit, 2008). This means that European market is the biggest spa market and this is one of the reasons why spa operators are interested to enter into this market.

**Table 4. Global Spa Facilities by Region in 2007**

	<b>Estimated Total Number of Spas</b>	<b>Estimated Total Spa Revenues (billion euro)</b>
Europe	22,607 (32%)	11.91 (39%)
Asia-Pacific	21,566 (30%)	7.38 (24%)
North America	20,662 (29%)	8.74 (29%)
Middle East-North Africa	1,014 (8%)	0.45 (1%)
Latin America-Caribbean	5,435(1%)	1.62 (5%)
Africa	389 (1%)	0.19 (1%)
<b>Total</b>	<b>71,672 (100%)</b>	<b>30.29 (100%)</b>

Source: Global Spa Summit (2008)

## 3.2 Spa industry in Europe

### 3.2.1 European spa market size

If we consider the market size, Europe is the biggest spa market in the world in term of number of spas and revenues. In 2007, it had approximately 22,607 spas and generated revenue 11.9 billion euro (Table 5). Spa facilities in Europe comprised of 14,933 day/club/salon spas; 4,297 hotel/resort spas; 1,202 destination spas and health resorts; 913 medical spas; and 1,262 other spas. Day/club/salon spa is the majority spas in Europe (66%) following by hotel/resort spa (19%) and destination spa and health resort (5%) respectively. However, in terms of revenues, hotel/resort spa and destination spas/health resorts accounted for a much larger share of the market as compared to their operator numbers. Day/club/salon spas account for 4.89 billion euro (41%), while hotel/resort spas and destination spas/health resorts together account for 6.17 billion euro (52%) (Global Spa Summit, 2008).

**Table 5. Spa Facilities in Europe in 2007**

	<b>Estimated Total Number of Spas</b>	<b>Estimated Total Spa Revenues (billion euro)</b>
Day/Club/Salon Spas	14,933 (66%)	4.89 (41%)
Hotel/Resort Spas	4,297 (19%)	2.98 (25%)
Destination Spas/Health Resorts	1,202 (5%)	3.19 (27%)
Medical Spas	913 (4%)	0.56 (5%)
Other Spas	1,262 (6%)	0.25 (2%)
<b>Total</b>	<b>22,607 (100%)</b>	<b>11.87 (100%)</b>

Source: Global Spa Summit (2008)

When considering the spa industry in different countries in Europe (Table 6), the top ten countries accounted for over 83% of industry revenues or 9,815.72 million euro in 2007. Among them, the three largest countries in terms of revenue (Germany, France and Italy) accounted for over 46% of industry revenues or 5,422 million euro (Global Spa Summit, 2008).

**Table 6. Top ten spa markets in Europe in 2007**

<b>Country</b>	<b>Estimated Total Number of Spas</b>	<b>Estimated Total Spa Revenues (million euro)</b>
Germany	3,971	2,486.54
France	2,746	1,487.64
Italy	2,391	1,447.85
United Kingdom	2,468	1,115.57
Spain	1,816	988.09
Austria	999	789.96
Russia	1,625	532.81
Switzerland	555	454.19
Greece	474	276.17
Netherlands	507	236.90

Source: Global Spa Summit (2008)

### **3.2.2 European spa trend**

Europe's spa market is strongly related to bathing culture dating back to Roman time that emphasized the use of natural and water-based elements for therapeutic, curative, and preventive treatments. Therefore, Europe is home to a large number of high-end health resorts and destination spas which emphasize wellness, traditional healing therapies, and medically-based services.

European spas have originally two types: mineral spring spas (including hot spring) and thalasso-therapy (hydrotherapy using sea water and marine products) (Cohen and Bodeker, 2008). Nowadays, European spas not only appear to be healing centre but also wellness centre with luxury service for persons who want to escape from stress or normal lifestyle to a calm and relaxing place.

In addition, as European customers are well known for their appreciation of local culture and authentic traditions, this is also embraced in their expectation for spa experiences as well. Recently the main popular trends are indigenous treatments from various regions and countries for instance the concept of "East meets West". This spa program combines various philosophies in one program such as Ayurveda from India, Thai massage from Thailand, lomi-lomi massage from Hawaii, or Traditional Chinese Medicine from China, etc (Spa Finder, 2006).

In the Thai style spa massage plays an important role. In general, massage is perceived in Europe for its wellness aspects only. The therapeutic aspects of Thai massage are underestimated by Thai spa customers. However this seems to be a promising aspect that requires further investigation.

Some interesting trends going on in the European spa market can be highlighted: change in demographic consumers' characteristics, response of customers toward economic situation, technology progress, and a continuous improvement of spa and wellness services (Langviniene and Sekliuchiene, 2009).

- 1) **Change in demographic consumers characteristics** - nowadays, there is a greater diversity of spa goers, whereas in the last decade the main spa goers were women at the middle age and elder. Nowadays, more men, teenagers and families are joining in the spa in addition to the former groups. Monteson and Singer (2004) mentioned that there is an increase in the number of younger spa goers (less than 30 years old) and McNeil and Ragins (2005) added that they became one of the fastest growing segments in the spa industry (Langviniene and Sekliuchiene, 2009). Spa Finder (2006) mentioned that recently the male segment size increased due to growing interest in results-oriented skin and body treatments.
- 2) **Response of customers toward economic situation** – due to the effect of economic recession, there are different responses from customers to spa industry. On one hand, under economic constraints, customers tend to choose to purchase necessary goods and services first, thus reducing expenditure in spa and wellness services. On the other hand, customers might choose spa and wellness services to escape from increasing daily stress (Langviniene and Sekliuchiene, 2009). Therefore, it is hard to predict the response of customers in this situation. A possible outcome is polarization: luxury vacations and experiences in high price for high-end market and discount spas offering beauty and body treatments in low prices for low-end market. According to some authors, the spa industry in Europe will expand at both ends of the market (Spa Finder, 2006).
- 3) **Technology progress** – investment in database management, integrated channel contact systems and marketing products/services online in spa industry are increasing (McNeil and Ragins, 2005; Langviniene and Sekliuchiene, 2009). Moreover, spa goers especially younger generations tend to use the Internet as a research database and extensively use online reservation systems.
- 4) **Continuous improvement of spa and wellness services** – spa operators must provide the right balance between regulations/standardization that ensure safety and quality and improving of the quality of service provision (Langviniene and Sekliuchiene, 2009). Spas will need to keep pace by

educating and optimizing staff in this topic as well (for e.g. by establishing stricter qualifications). Langviniene and Sekliuckiene (2009) mention that continuous improvement does not relate only to tangible assets of the spa, but also to organizational climate, training of the staff and motivating them to look for new possibilities to satisfy the customer, and management of service quality.

Following this trend, spa standard certification might be helpful for operators who would like to compete in the spa sector to gain trust from customers.

### **3.3 Spa standards**

Due to high competition, the global financial crisis and a maturation phase of the spa industry, spa operators face challenges in distinguishing themselves from competitors. The emerging of spa standard certification is one of the attempts to gain trust from customers and to differentiate spa services.

In general, starting a spa business requires the owner/manager to comply with service business regulation and health and sanitary regulations in force both in the country and in the local area. For instance, in Thailand it is mandatory to comply with “Service Places Act (B.E. 2509), amended by Service Places Act No.4 (B.E. 2547)” and “Ministry of Public Health Announcement – Governing Thai Spa Standards, April 2004” to open spas. In addition the Ministry of Public Health, Thailand, has also established a **compulsory quality standard to Thai spas and spa operators in Thailand** (Ministerial Announcement Governing Thai Spa Standards April 2004 issued by the Ministry of Public Health on 21 April 2004). These law and regulations set basic health and sanitary and ethical business issues which are important for spa business, ensuring that all spas are able to assure a satisfactory level of safety.

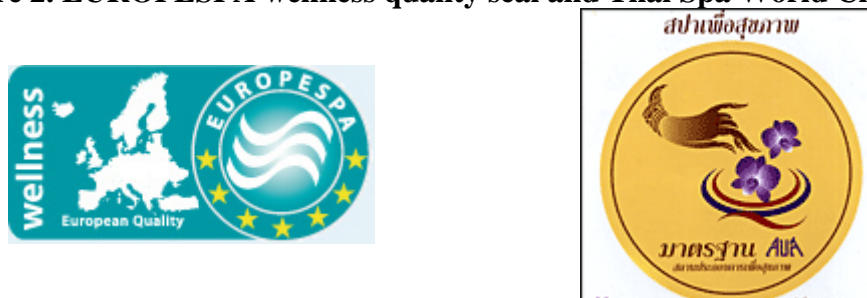
In order to differentiate from other spas, some spa operators may choose to comply not only with the **compulsory standard level**, but also to apply more stringent quality assurance **voluntary standards** to guarantee the customers that they will get high quality services. In this way, the spa operators could keep continuously improving their services.

Very few **voluntary spa standards** are available in the global market. We found references to the ‘EUROPESPA’ standard from European Spa Association (ESPA) and to the Best Health International (BHI) standard Certification that is

awarded by TÜV Rheinland as standards that can be applied everywhere in Europe. The BHI standard derives from the Austrian standard (Austria Gütezeichen Gesundheitstourismus) that has been officially recognized by the Austrian government and is certified in Austria by a governmental certification body (ÖQA).

In France, the French certification body “Spas de France” developed a voluntary certification that guarantees the quality and reliability of spa services; it includes reception and support of customers, the decor and comfort of the structure, equipment and facilities as well as staff qualifications and the diversity of treatments available. In Thailand a joint state-and-private-sector partnership developed ‘Thai Spa World Class Standard’ in 2008.

**Figure 2. EUROPESPA wellness quality seal and Thai Spa World Class logo**



### **3.3.1 Main features of spa standards: EUROPESPA**

The ‘**EUROPESPA wellness**’ quality seal (Figure 2) was developed by the European Spas Association (ESPA). This standard aims to assure that the holder of EUROPESPA seal meets the requirements of ESPA in terms of general wellness infrastructure, wellness service, hygiene and safety (details about this standard are available here: <http://www.europespa.de/en/about-europespa/the-europespa-wellness-seal-of-approval.html>).

The evaluation criteria address the following areas:

1. Management system and conformity
- 2 Procurement and provision of water and peloides for wellness
3. Wellness applications
4. Accommodation & Environment

The certification remains valid for 3 years. The set of criteria applied contains about 350 audit questions checked through an announced audit on site and approx.

600 testing points in an anonymous check (“mystery test”) made by a professional auditor (about two times in three years). Thus, the certified spa adopting this standard commits to continuous, step-by-step improvement to a high quality level.

### **3.3.2 Main features of spa standards: Thai Spa World Class Standard**

‘Thai Spa World Class Standard’ was established in 2004 by a joint state-and-private-sector partnership - Ministry of Public Health (MoPH), Ministry of Tourism and Sport, Tourism Authority of Thailand, Office of Tourism Development, and Thai Spa Association. This standard aims at establishing voluntary, more stringent criteria (compared to the compulsory standard level) of services, human resources, tool and equipment, management, organizational management and ambience for satisfying customers and striving to achieve the international health spa standards. Thus, it will lead to the increasing recognition of Thai health spa quality among other countries. The Office of Health Business Promotion, Department of Health Service Support, developed a handbook on “Criteria for Quality Certification of Health Spas”, available both in Thai and English language, to be used as a tool for developing, inspecting, evaluating, and certifying health spas according to Thai Spa World Class Standard.

The handbook Criteria for Quality Certification of Health Spas is divided into 5 standard sections: Service Quality, Skill Staff, Tool and Equipment, Organization & Management Quality, and Ambience. These criteria proposed ‘Service Quality’, ‘Skill Staff’, and ‘Ambience’ in addition to general sanitary and health regulation which is compulsory to operate the spa in Thailand according to Thai law, ‘the Service Enterprises Act, B.E. 2509 (A.D. 1966), amended in B.E. 2551 (A.D. 2008)’. This standard is expected to add value to Thai Spa as it focuses on service and staff skills, which is crucial for Thai spa operations.

In order to achieve the certification, a health spa must fill and submit an application form and provide the required information to the Office of Health Business Promotion, Department of Health Service Support, Ministry of Public Health, Royal Thai Government. Then the officers will visit the site to evaluate the spa service and facilities and assign a score according to the requirements of the standard. The quality certification is valid for a period of three years and certified facilities are allowed to use the Thai SpaWorld Class logo (Figure 2).

The quality of health spas in Thailand is classified into three levels on the basis of the score achieved: Platinum, Gold, and Silver.

- **Platinum Thai Spa** – obtain standard points at 90%
- **Gold Thai Spa** – obtain standard points at 80%
- **Silver Thai Spa** – obtain standard points at 70%

The health spas have to be scored at least 50% at all five sections, i.e. service quality, skill staff, tool and equipment, organization & management quality, and ambience.

This standard was published recently, and as of 2010 only 29 spa operators were certified by Thailand Ministry of Public Health (เรื่องรังษี และ พลาญเวช, 2011). However, the spa operators in Thailand have shown interest to adopt it, in order to reassure customers about the quality of spa and to strengthen their competitive capacity.

### **3.3.3 Comparison between European and Thai spa standard**

In Table 7 we summarize the main differences between EUROPESPA Certification and Thai Spa World Class Standard.

**Table 7. Comparison of the main features of EUROPESPA wellness and Thai Spa World Class standards**

<b>Features</b>	<b>EUROPESPA</b>	<b>Thai Spa World Class</b>
Key points	<ol style="list-style-type: none"> <li>1. Management system and conformity</li> <li>2. Procurement and provision of water and peloids or therapeutic muds for wellness</li> <li>3. Wellness applications</li> <li>4. Accommodation/Environment</li> </ol>	<ol style="list-style-type: none"> <li>1. Service Quality</li> <li>2. Skill Staff</li> <li>3. Tool and Equipment</li> <li>4. Organization &amp; Management Quality</li> <li>5. Ambience</li> </ol>
Duration of Certification	Valid 3 years	Valid 3 years
Audit and inspection	Two times in three years: audits and anonymous checks	Announced audits and inspection
Pre-requirements	<p>Not specified.</p> <p>However, wellness services have to comply with safety and hygiene law and regulation in force in the country and place where they are located.</p>	<ol style="list-style-type: none"> <li>1. Health spas must be certified according to MoPH (Ministry of Public Health) Announcement on <ul style="list-style-type: none"> <li>- defining health and beauty service enterprises,</li> <li>- standards for services,</li> <li>- service providers, and</li> <li>- principles and methods for inspecting and certifying standards for health and beauty service enterprises according to the Service Enterprises Act, B.E. 2509 (A.D. 1966) (valid 1 year)</li> </ul> </li> <li>2. Health spas must be legally operated or be established in accordance with all Thai laws</li> </ol>
Classifications	No	<p>Classified into 3 categories</p> <ul style="list-style-type: none"> <li>- Platinum Thai spa (standard point at 90%)</li> <li>- Gold Thai spa (standard point at 80%)</li> <li>- Silver Thai spa (standard point at 70%)</li> </ul>

Features	EUROPESPA	Thai Spa World Class
Main focus	<p>Establishing fixed parameters and checklists for assessing SPAs levels of infrastructure, hygiene, safety and comfort, issues. Due to the fact that regulations and standards in force regarding such aspects, vary considerably from one country to the next according to local laws (making competition unfair : different quality standard reflected in prices) EUROPESPA aims to establish high quality assurance regarding wellness infrastructure, service, hygiene and safety</p>	<ul style="list-style-type: none"> <li>- Cope with international high level quality, hygiene and safety standards</li> <li>- Acquire and strengthen international recognition with focus on specific attribute linked to “Thainess” resulting in a potential increasing demand of culturally authentic spa experience</li> </ul>



## **4. Results of the qualitative study**

The following sections describe the results of the content analysis of interview transcripts and summary reports, presented in form of semantic category and organized corresponding to the structure of interview guideline. Significant and relevant topics were highlighted through informants' verbatim quotes.

It is important to note that we provide here a perspective on Thai spa in the European market (focused on Italy, France and Germany) that reflects the information about experiences, perceptions and opinions we obtained from the interviewees. Given the qualitative nature of the study and the sample size, these opinions cannot be considered as generally valid and statistically representative of a population of spa business operators. We do not report frequencies, since an exploratory qualitative study does not aim at measuring a phenomenon using descriptive parameters but at exploring diversity. (Jansen, 2010)

The discussion is organized into 6 sections: (1) Situation of Thai spa in European market (Italy, France and Germany), (2) Perception toward Thai spa, (3) Attitude toward spa standard, (4) Perception toward Thai Spa World Class standard, (5) Potentials and Barriers of Thai Spa World Class Standard, and (6) Suggested marketing strategies for Thai spa.

### ***4.1 Situation of Thai spa in European market (Italy, France and Germany)***

'Thai massage' is available and well-known in Europe as a traditional massage that helps to relax and release stress from daily life-style. Especially 'Thai health massage' gets more interest from customers and operators because of outstanding performance that is able to increase wellness and external beauty of customers and is totally different from European beauty massage in general. Many tourists have visited Thai spa in Thailand and would like to have the possibility to make use of Thai spa in Europe as well. Even among customers who have never been to Thailand, many have heard of or got to know Thai massage already.

However, possible misunderstanding and confusion between traditional Thai massage and the so-called “Erotic Thai massage” is the most serious issue that misleads customers and operators to perceive Thai traditional massage in a sexual connotation. Many ‘Erotic Thai massage studios’ operate in Europe. This was mentioned as a very serious issue in every country surveyed and it detracts from the good image and even reduces the real perceived value of ‘Thai traditional massage’.

Some respondents mentioned that Thai massage should be performed by Thai people to guarantee that customers get the authentic Thai massage. However, labor law is a big barrier impeding Thai people of coming to Europe as masseurs or trainers for Thai massage courses. In this regard, the Thai Ministry of Public Health, which controls quality of masseurs through qualification and certification of massage training attendance and exams, may play an important role to allow distinguishing highly qualified practitioners, trainers and consultants and screening out and avoiding confusion with people who are aim at working in Thai erotic massage studios in Europe.

In addition, the role of both health/sanitary laws and labor law and regulations for spa and wellness centre has been highlighted. Thai operators or masseurs should first become aware and understand each country’s law and regulations, which is different among EU countries, before they try to enter to the market.

The situation in Italy at present is characterized by the presence of overlapping and undifferentiated service categories. There are massage centers, wellness centers, spas, with most hotels giving beauty salon services, in some cases open 24 hours a day; but there is no clear differentiation between such services.

The trend, at the moment is to give more attention to an approach, which can be called “oriental” (e.g. appropriate welcoming, adequate environment) and to the supply of high quality services.

Both respondents from France have operated Thai spas and are enthusiastic to apply for Thai spa standard. Most of their masseurs are trained for Thai traditional massage.

In Germany a strong development of Thai massage and spas can be observed especially in the last ten years. Most of the massage centers offer just Thai

massage (like 99% of the businesses in the opinion of the interviewee), nearly no business offers real Thai spa, so far. Most of the Thai massage centers in Germany are small businesses, with 1- 2 employees and the quality of service is highly variable. There are Thai spas working according to the original Thai massage and spa tradition with highly qualified masseuse, and others where the employees do not have a very good training. In this regard, the qualification of the employees plays a major role in differentiation.

In Germany, a ‘German Thai Spa Association’ (Thai Spa Vereinigung Deutschland e.V.) has been established, with 22 members in the present time (2011). The association is involved in a process to establish a standard for its members in collaboration with the Thai Ministry of Public Health. The members are very interested in collaborating in the research and to get more information and results from the project. For the association, collaboration with Thai partners is very interesting. For them it was important to be sure that there is not a parallel certification process going on together with the one they are establishing right now. Furthermore, they would like to use the chance to establish further contacts with Thai partners.

Other wellness and Spa businesses not involved with Thai spa tradition, did not agree to collaborate in the study and seemed to not have much experience with or knowledge about Thai spa tradition. Currently, in Germany there are many Thai massage centers and not so many Thai spas; nevertheless, many of the Thai massage centers are already expanding or intend to develop into the traditional Thai spa business.

In many of the cases observed in Germany, Thai women and their husbands are the owners of the Thai Spa. The employees – the masseuses – are always Thai women.

#### **4.2 Perception toward Thai spa**

Thai Massage is perceived as a unique form of energy bodywork that leads to a deep release, helping the customers to rest from the stress of everyday life while Western style spa is focused on beauty and aesthetic treatments only.

The respondents mentioned that Thai spa is unique in wellness treatment because its techniques are part of Thai culture and way of life transferred from generations to generations. In addition, the ‘Thai smile’ and gentle hospitality create comfort

and a sense of relaxation to customers and are great assets of Thai spa. These opinions and perceptions were consistent in all of the three countries analyzed – Italy, France and Germany.

The degree of familiarity with Thai spa of European type spas operators was found to be varying. We could find totally different perceptions of respondents between the ones who involve with Thai spa and the ones who operate European spas.

Business people who have already engaged in oriental or Thai spa activity are very well informed and have a good knowledge of Thai spa tradition and Thai culture in general. On the contrary, Spa businesses focused on a western type spa are not familiar with Thai spa practices and don't show much interest in it either.

For instance, a respondent in Italy coming from a classical Italian spa and wellness center didn't know the Thai spa typology. Furthermore, in his opinion, in Italy the interest for such kind of spa is very low. This is also the reason for him to choose the traditional Italian spa typology instead of Thai spa. The interviewee thinks that Thai spas still aren't known in Italy and final customers need time to get used to novelties of Thai spa. Therefore, probably they are not willing to pay more for a kind of service they don't even know. The interviewee said that from his experience it took 2-3 years to make people aware and used to innovative services provided by his center.

According to French respondents, instead, the interest for Thai spa style is very high due to the large Thai community in the country. They are supposed to be able to spread the cultural aspects that are inside this practice. Large numbers of Thai style spa staff and operators have Thai origin, contributing to a higher standard similar to the practices that can be found in Thailand (e.g. Thai massage).

#### **4.2.1 Strengths of Thai spa**

- **Holistic approach to wellbeing and health.** An important aspect which distinguishes Thai spa tradition from European treatments is its holistic approach to wellbeing and health. Thai spa addresses the five senses (e.g. holistic, rooms decorated in an Asian style, Asian music, specific oils and fragrances, tea offered after treatment) of the human being and therefore is especially efficient to decrease stress.

It could be observed that the European customer first has to learn to dedicate time to the relaxing Thai spa treatment. In Germany it was possible to observe that, when customers come for the first time to a Thai spa, they are very hectic and generally don't want to dedicate more than maximum one hour to the massage. Customers first had to learn that traditional Thai spa treatment takes time.

Also the Italian case underlines the importance of the holistic approach. Thai spa takes care of the physical and mental wellness of their guests following the Thai philosophy seeking to improve interior harmony and exterior beauty of guests.

- **Good reputation of healing effects of traditional Thai spa treatments.** The appreciation of Thai spa is very high after customers made their first experience. Customers who experienced Thai massage said that they can benefit from the Thai Spa treatment for their health and well-being for several days. Furthermore very impressive is the observation that for some customers, Thai spa was more effective for improving health issues than the treatment they got prescribed from their doctors.

*“I was impressed when I discovered that some clients can experience more benefits from Thai spa treatment for their health than from the classical physiotherapy.” (A spa operator in Germany)*

Several clients said that the only thing that helped them with their health problems was Thai massage therapy. This is also consistent with the situation found in Italy. This was considered very impressive because physiotherapy is paid by health insurance in Germany as well as in Italy.

In a talk with a physiatrist in Bologna (a physician who specializes in physical medicine and rehabilitation) a clear interest to test and evaluate the effects of Thai massage in medical therapies has been highlighted.

- **Thai spa is valued for its genuine and authentic tradition.** European customers give value to genuine and authentic traditions. Thai massage has a long tradition and can create a very authentic atmosphere, which is appreciated by the European customer. Therefore, Thai spas, who could present atmosphere, historic and traditional massage, have a good chance in European market.
- **Good service, friendliness and ambience.** An advantage for the Thai Spa is the natural friendliness of the Thai employees, for example the natural smile of Thai people. This friendliness makes customers feel comfortable at the Thai Spas. Another factor is the ambience of the Thai spas in

general, which creates a stress-free atmosphere and holiday feeling. The Asiatic ambience creates furthermore an atmosphere of tranquility.

The ideal guests of Thai spas are persons that have already experience and knowledge of spa services and in particular of Thai spa services to be able to appreciate the unique form and style of Thai spa. This is due to the fact that European clients first have to experience the very specific Thai spa tradition and be open to experience. The typical clients are persons who are open to exotic experience and alternative treatments from other cultures.

#### **4.2.2 Weaknesses of Thai spa**

- **Thai Spa image.** All the interviewees pointed out the difficulties to establish an image of respectability and seriousness. The first thought if one mentions Thai Spa and massages is always about erotic massages and prostitution.

*“This is an image problem we as a business really suffer from.”(A spa operator in Germany)*

So far the European Spa business has not succeeded in moving away completely from a sexual connotation. Generally the image of Thai Spa is worse among women.

*“Mostly its women who have a negative image concerning Thai spa, they think about prostitution, red light districts; this is an issue we have extreme problems with.” (A spa operator in Germany)*

Therefore, further market penetration and the attraction of new customers depends on the capability to establish an earnest and serious image. Once the customers experienced Thai spa tradition they are generally excited and there are few other weak aspects to mention.

That’s one of the reasons why several Thai Spa businesses founded the German Thai Spa Association in 2009 with the objective to create a positive image and make a marketing campaign to develop a positive image of Thai Spa.

The activities of the German Thai Spa Association were able to improve the bad image of Thai massage and Spa; nevertheless it is still difficult to change that image in people’s perception. One of the German interviewees tried to establish

respectable image in the beginning of the business collaborating with a local hairdresser.

In the respondents' opinion, Thai spa businesses have to discuss this problem very openly and need to give the customers the possibility to find the information they need in the Internet or via the telephone etc.

- **Differences in the qualification of the employees.** It is important to establish a quality standard for education and training of Thai masseuses. At the moment both very well trained masseuses and masseuses with a bad training operate in the European spa business, creating confusion and uncertainty among customers. It is important to have a standard which proves the qualification of the employees also to improve the image.

*“There are people who learned it once somewhere on the beach and think they can open a Thai massage business in Germany.” (A spa operator in Germany)*

Therefore, it is important to be cautious when choosing employees and it is important to carefully check their qualifications. Sometimes, spa businesses have the problem that their employees ‘give a little more service’ (erotic massages) than they are supposed to do. It’s important to have qualified employees that cannot damage the image of a respectable massage center.

A German respondent mentioned that in Thailand it is possible to buy a certification without even having a specific qualification. For European businessmen it is difficult to understand the many different certifications of different types of qualifications that exist on the market.

*“That means, before I employ a new masseuse I let them perform a massage on me; that’s the best way in my opinion to check their qualification.”(A spa operator in Germany)*

The qualification of the employees is the most important strategy to have a high quality business at the moment, according to the German respondents. New employees are trained very well from the Thai spa owners and guided in the beginning of their employment.

Quality of massage technique of the masseuses is an important factor to generate customer loyalty.

*“Some of our former employees tried to open a studio themselves but they aren’t able to keep up the quality. We heard that from one of our clients, who tried the new Spa because they didn’t want to wait 4 weeks for an appointment at our business, and in the end they came back. So, it’s the quality that counts to bind the customers.” (A spa operator in Germany)*

According to some respondents, the best option would be establishing an integrated system with training on massage and spa techniques from Thailand and with a final exam organized according to European standards. That could help selecting the best masseuses, limiting the access to unqualified workers and would improve the overall quality and image of the whole Thai spa business.

- **Culture and language differences** Sometimes Thai masseuses seem to have problems understanding the western culture. In order to cope with this issue, for instance, in Germany the spas together with the German Thai Spa association organize seminars for Thai masseuses to train them about the right approach to customers. Sometimes language problems occur in communication with customers, but it’s not considered a huge problem.
- **The price positioning of Thai spa is not adequate.** Thai Spas and massages are generally considered cheap, compared to the quality of service they provide. Sometimes the cost of their services is only half the price paid in European style Spa and massage centers, even though the Thai treatment is much more demanding and accurate.

According to respondents’ opinion, price level was initially affected and under-cut down by the massage centers offering “Thai” erotic massages and employing unqualified workers. As a result it is a difficult task to make a repositioning and to push up the price to a more adequate level.

On the other hand, even though price competitiveness is important, quality/price ratio is usually the most important attribute of a service, and the level of price somehow could be used to screen customers and it may represent a signal of the

quality of spa, helping the customer to distinguish “real” Thai spas from those just offering “erotic” massage.

### **4.3 Perception toward spa standard**

In general, standards can represent a value-enhancement tool for spas toward the final customer. Among thousands of spas in the market, spa businesses that can differentiate obtaining a certification according to a well-established standard could achieve a competitive advantage. In addition, consumers nowadays are accustomed with standard and certification systems and somehow are looking for them as signals of the quality of service. However, a spa standard itself is not necessarily the recipe of success for spa businesses, since it depends rather on quality of service than on certification. Therefore, its usefulness depends on the ability to stimulate continuous improvement of service quality.

In all three countries interviewees did not mention a clear and specific law setting a compulsory level and regulating beauty centers, aesthetic centers or spas. The main differences are related to the number and variety of services and treatments available in different centers, where a spa is expected to be the more equipped and with water-related facilities widely available.

There are, in any case, different perceptions among respondents in different countries. **In Italy and France**, spa standard is perceived as no guarantee of good service, but it could help a professional spa in distinguishing them from the massage parlor. It may also be helpful to distinguish a real Thai spa from an erotic Thai massage center, assuming that the latter is not interested in certification. The respondents mentioned that the real aim of a standard is not to establish minimum requirements, but to serve as a definition of excellence service. Furthermore, training-related aspects are essential to defining the quality standard of spa. Whereas in **Germany**, spa standard is perceived as a reference document that should set the minimum requirements especially on sanitary and health issue in spa centers. Nevertheless, of course, spa standards should comply with each local sanitary and health, and labor laws and regulation of the country where it is located.

#### **4.3.1 Italy**

Right now in Italy there are two laws concerning tanning centers, where the aspect of safety plays a crucial role. A standard developed abroad must necessarily cope with Italian standards and regulations for safety. The certification has to be based and integrated with Italian legislation, and cannot replace it.

A voluntary certification can, at best establish closer and more stringent requirements. In any case, in the respondents' opinion certification is not interesting for a typical Italian customer; it is rather typical of Nordic countries such as Germany and Austria (e.g. certification on facilities for disabled people).

According to our respondents, the real aim of a standard is not to establish minimum requirements, but to serve as a definition of excellence.

Currently, the Italian spa sector is confused due to the high number of operators, the majority of which provides low quality services. The only way to consolidate the present position of Thai spas is to continue to provide high quality services to guests that are the sole judges of the quality of the service.

The certification is not a guarantee of good service. The results of certification will be seen only in the long term, conditional to its orientation to continuous improvement. However, certification could give an advantage to Thai spa businesses and to certified Thai spas as long as consumers are getting used to certifications and increasingly trust them.

#### **4.3.2 France**

The respondents expressed the opinion that the certification would be a great advantage to differentiate professional spa from the erotic massage centers that are confusing consumers and damaging the reputation of serious businesses. However, a standard itself cannot be a guarantee of service quality.

#### **4.3.3 Germany**

Respondents said that a certifiable private standard from the German Wellness Association is already available. The problem with the available standards is that they are not suitable to underline the differences of Thai Spas compared to others and to distinguish the quality of Thai spa. For this reason, the German Thai Spa association wants to elaborate a standard and certification process of its own.

According to the respondents it would be important to have a standard for the spa businesses and for the qualification of the employees. Customers will be interested in a label which signals compliance to a standard. It's already possible to observe that, for example, customers search for the certification label of the German sanitary institute (DGHM - Deutsche Gesellschaft für Hygiene und Mikrobiologie e.V.) , which is an independent institute that also certifies hospitals and sanitary facilities: customers look at the label, they ask information, want to

know what the certification entails. It can be a problem if for example some employees do a very good job but don't have a qualification certificate, because customers ask for a certification of their education and training. This hygienic certification is voluntary but in Germany it is fundamental to prove safety and respectability. The interviewed companies were certified by DGHM.

*“For my company this certification is very important. A problem is that it's also very expensive.”(A spa operator in Germany)*

The German market appears to be the most receptive to spa standard. The most relevant points raised by the interviewees may be summarized as follows:

- **Important standard contents: Hygiene is one of the most important aspects.** Comprehensible and traceable standards are required: it's important that the standard is comprehensible and traceable also for customers.
- **Standardized qualification and certification of the business:** It is important to establish a standardized certification system for the spa business. Standards for spas are available in Europe but they are mainly focused on hygiene.
- **Labels guide the consumer when choosing a Spa:** Labels and standards help the customer to distinguish among service providers and in deciding which Spas to choose and which are better to avoid. However, different attitudes towards labels and standards exist in the analyzed countries.
- **Customer ask for standards, but only the first impression matter.** Customers may be interested in standards and ask for them. However, the most important aspect is the first impression the customer gets, his personal impression whether the place is clean and hygienic.

*“The customer will notice and say: ‘ah, ok, they are certified.’ Nevertheless, the really crucial aspect is the first impression the client has when he opens the door.”(A spa operator in Germany)*

*“You can be certified but if your business isn't clean no one will believe you.” (A spa operator in Germany)*

#### **4.4 Perception towards Thai Spa World Class Standard**

Not surprisingly, 'Thai Spa World Class Standard' is unknown to most respondents except some persons who are members of German Thai Spa Association. Nevertheless, the survey showed many interesting aspects which

In France and Germany respondents showed a very high interest in establishing a Thai Spa World Class standard or at least a similar standard. The Standard was perceived as an added value for the Thai Spa, since clients are looking for a certification to be confirmed in their choice of quality and type of treatments.

#### **4.4.1 Italy**

One Thai spa interviewed in Italy does not certify according to any quality standard. Moreover the respondent is not aware of any certification for spa including Thai Spa World Class standard. Nevertheless, they expected that “certification” should guarantee that the spa is performing traditional Thai massage and not be confused with the so called “erotic Thai massage”.

Another respondent who is an auditor and quality manager in the service sector, mentioned that the project on Thai spa World Class standard in his opinion has been well designed, giving the staff training issue a central and decisive role.

No particular points of weakness in the Thai Spa World Class project were highlighted. Perhaps, the very demanding requirements (in particular the environmental standard number 5 Ambience) could be a limitation, but at the same time it may be a point of strength.

An Italian business tourism expert, who was not specifically involved in Thai spa business and was not aware of the Thai Spa World Class standard, expressed the opinion that this Standard could be advantageous for spas adopting it. The interviewee is generally skeptical towards the success of Thai Spas in Italy, but has a positive attitude towards the introduction of the Thai Spa World Class standard, since it defines high quality levels of service and set up clear rules to differentiate businesses. In his opinion, the Thai spa must remain an elite standard. Thai spa can become an important segment in a niche, but has to be of excellent quality to distinguish from the problematic erotic Thai massage. He identified specific strengths and weaknesses.

- **Strength: Differentiation represents the advantage** of the project, as it makes no sense to replicate existing situations like the massage parlors, or otherwise defined which are proliferating everywhere.
- **Weakness: Any grading system in certification, especially at an early stage, would only lead to confusion;** moreover it could represent a

problem to communication actions. The respondent said it is better to create a unique brand for high quality Thai spa, to be obtained by reaching a threshold score in the introduction phase. This would be also a stimulus to competition among high level structures, pushing them to improve the score. This opinion is confirmed also by the German respondents. They would prefer a high level standard without grading, which also according to them would only create confusion among the customers. However, an expert from an Italian certification body expressed his appreciation for the grading system, since it may stimulate quality improvement without hindering the access to the label.

From the viewpoint of the competition between the structures, certification represents a sort of license to be maintained and **renewed year by year and that may be revoked at any time.**

Limitations could be a general **lack of knowledge about the specific products and services** provided by Thai spas among the customers and consequently no demand from the market for such kind of products and services. It will need time to make consumers aware about new products and services.

#### **4.4.2 France**

Both respondents from Thai spas are very interested into this standard because it would be a great opportunity to protect the global interests and image of quality Thailand products and services.

A respondent showed his positive attitude toward Thai spa; hence he highly trusts methods and rules of Thai spa certification and he is ready to be certified and monitored by a Thai certification body. He mentioned that it could be an advantage to customers as well, since it would guarantee the quality of services they will obtain.

#### **4.4.3 Germany**

In Germany we experienced a high familiarity of respondents with Spas and also awareness of the Thai Spa World Class Standard.

For the German respondents the standard have not to be just used as a mere image-enhancing tool. The goal is to establish a certification that requires high level of the business quality performance of the participating companies. It is of utmost importance that it especially outlines the specific Thai attributes of the

business. In their opinion, **Standards create trust in the consumer**. It would be important, that customers could see that the spa is certified by the Thai Ministry of Health when they visit the facility. Spa customers can be assured that the employees have a real qualification as well as that the hygienic standards are met.

In one respondent's opinion, criteria currently evaluated in the Thai spa standard are not all suitable to Germany.

The **German Thai Spa Association** (Thai Spa Vereinigung Deutschland e.V.) is currently a relevant player in the market and membership is considered a first kind of quality signal. The members of the association agreed on certain internal quality standards for their businesses.

The association is also currently engaged in developing a standard to certify German Thai spas and massage centers. This standard development process takes place in collaboration with the Thai government. The Thai Spa Association is working on the development of a Thai spa standard since 2009.

So far, the following aspects have been discussed to set up the certification process in Germany:

- Description and presentation of the company that wants to be certified;
- Inspection and validation of the performance by the German Thai Spa Association,
- Issue of the certificate by the Thai Ministry of Health.

**The task of the German Thai Spa Association therefore is to revise the checklist of the Thai Spa World Class Standard.** It is engaged in eliminating from the Thai Spa standard aspects that are not important for Germany and adding others that are not relevant in Thailand but are decisive for the European market.

For example, in the Thai spa standard it is checked whether one has a business authorization, while in Germany this is not considered relevant since opening a store without authorization is not conceivable in Germany. In addition, some parts of the standard can be simplified because specific rules and regulations already exist. Water quality and electricity are further aspects that do not need to be part of a standard in Germany or Europe in general, since they are taken for granted.

Furthermore, the Association wants to establish the requirement that all the employees have insurance because Thai traditional massage is believed to have a higher risk of injuries in case it is not properly practiced. While it seems that not

all Thai spas provide insurance for their employees, it is a standard procedure. Furthermore, this issue may represent a potential problem for the Thai spa since some customers may be worried about the risk linked to Thai massage. However, the certification of skilled staff may enhance the trust of customers who will receive the service (massage) from professional masseurs.

In a pilot phase the standard will be applied first to members of the Thai Spa Association.

Last year (2010) the association had organized an advanced training seminar in Germany with instructors from the Thai Ministry of Public Health. Once a year people from the Thai Ministry of Public Health come to Germany to visit the Thai Spa centers. They collect information if someone wants to become a new member and prepare an information package about the applying Thai spa and send it to Thailand for being checked by the Thai Ministry of Public Health.

#### ***4.5 Potential and Barriers of Thai spa with Thai Spa World Class Standard***

##### **4.5.1 Potential and perceived benefits**

- **Standards allow improving the know-how.** The standard will allow improving the know-how about Thai spa tradition of the employees and owners of Thai spa businesses because during the auditing process they will have to learn many different aspects. It starts with first-aid techniques or right implementation of hygienic standards. Furthermore, it guarantees to the business that they work according to rules and regulations and that they offer a high quality service to the clients.
- **Standards allow differentiation and protection of interests of quality Thai spa business.** The certification would be a great advantage to differentiate professional spa from the erotic massage centers that are confusing consumers. Furthermore, it could be a great opportunity to protect the global interests and image of quality Thai products and services.
- **Standards add value.** In case of a well-known brand or seal which could stand for high quality level of spa, internationally or nationally recognized, it could be an added value and it could be recognizable. At the moment, there is nothing like that or nothing similar to be found. If the spa could be associated to a high quality well known network of spas, consumers could

immediately associate the spa to the high level of quality and service provided, and could be able to give the right value to the label. Nevertheless a standard alone is not sufficient to make spa business success, high quality of service provided is a critical success factor of the business.

- **Standards work as a guideline for the customers.** The Thai spa world class standard offers orientation to the customers. If the business is certified, customers can be sure that they work according to clearly defined rules. Since some customers are confused about Thai spa and are not well aware of the well-being focus of traditional Thai spa practices, the standard may be helpful.
- **Standards foster qualification of the employees.** In Germany, the spa business owners expressed the need to establish an official vocational education and training system in the future so that Thai Spa masseuses can take seminars and have to take an exam. This is considered necessary to improve the quality and trustworthiness of the business. Every person who wants to open a spa, or at least the staff, has to be qualified through an exam. This should help avoid problems of people who don't have the right education and damage the general perception of quality of Thai Spa practices.

#### **4.5.2 Barriers and critical issues**

The main barrier perceived by the respondents is the lack of awareness and **knowledge of both spa operators and customers about the Thai Spa World Class Standard**. In order to truly add value, this standard should be recognized by both operators and customers. Therefore, promotion and communication are very important; otherwise, the operator may have no incentive to adopt the standard.

In addition, the following elements may be highlighted:

- **Grading system** (platinum, gold and silver) may generate confusion among operators and customers especially at the initial stage to introduce Thai Spa World Class Standard. The unique seal is more feasible and is easier to recognize by consumers.
- **Duration of certification and frequency of audits** – one respondent in Italy said that certification should represent a sort of licence to be maintained and renewed every year that may be revoked at any time.
- **Certification cost** is mentioned by some respondents in Germany and Italy. The operators are not willing to pay a high additional cost for

certification, except if it is well known among consumers and therefore it adds value.

#### **4.6 Suggested marketing strategies for Thai spa**

The respondents mentioned some marketing strategies as a suggestion for Thai spa.

- **Gift coupons to attract new customers.** One important way to establish a name and image for the Thai Spas in Germany seems to be the gift coupon business. Gift coupons were a very good way to attract new customers; the gift coupons helped to establish seriousness of the activity. It favors word-of-mouth communication since clients who liked their experience, may buy gift coupons for their friends etc...
- **Ambience as a key brand feature.** The first and best way to inspire trust is to create the right link between brand and service features: in the case of Thai spas the key attribute is ambience: Asian style, approach to customers, nice smell, flowers, etc., together with cleanliness, hygiene. The customer should consistently recognize these common traits in all the businesses labeled as Thai spa.



## 5. Conclusions and recommendations

This chapter is divided into 2 sections: in the first section we summarize the main results from the survey and literature review and in the second section we give the recommendations for ‘Thai spa world class standard’ foundation in order to introduce Thai spa standard to the European market. However, it should be noted that the conclusive recommendation cannot be given by qualitative research approach.

### 5.1 Summary of the main results

The main results are quite similar in the three countries considered in this study – Italy, France and Germany. Regulation of spa business in Europe is not harmonized at the moment and there is no specific law to comply with to start a spa business. However, the sector is regulated in the different EU countries according to more general laws. For instance, in Italy spa is categorized as an aesthetic center so it needs to comply with aesthetic center law. Nevertheless, to open the spa in every country it would have to comply with general business law, sanitary and health law and labor law as basic requirements, which may vary across countries.

The most relevant points elicited from the interviews are listed as follows:

- **Thai massage is considered as a service with a strong cultural identity**, that is a strong differentiating element for Thai spas.
- **Difficulties to establish an image of seriousness and respectability**. The image that Thai spas and massages is damaged by confusion with sex-related services, due to association to the many Thai “erotic massage centers” operating in Europe. This is the most important issue that has to be addressed to improve respectability of the business and to allow further market penetration. It is a difficult process that will take time to change the negative associations people often have when asked about Thai spa and massage.
- **Positive attitude among people that experienced Thai spa**. A huge difference between the perception of people that never have had experience with Thai spa massage, and others who experienced Thai spa

treatment exists. People who experienced Thai spa and massage basically have a very good perception of these traditional techniques. After the first experience, many people are convinced and come back to Thai spa treatments. Furthermore, they also tend to make a lot of positive word-of-mouth advertising, which is the most effective marketing communication tool. In fact, most of the new customers are attracted in this way. People who experienced Thai spa and massage value especially the strong healing effects of this treatment, from which they generally can benefit for several days. The stress decreasing effect of Thai spa is also very high.

- **Improving Thai spa image can be pursued through qualification and training of the employees.** One crucial aspect to improve the overall image and market position of Thai spa is to guarantee a very high qualification of the employees. A good strategy to improve the general quality could be to establish a training system and certification/exam process for all the Thai spa employees, so that their instruction is guaranteed and meets appropriate standards.
- **Price positioning of the Thai spas should be adequate.** According to some respondents Thai spa in the European market is to be a business of excellence and should offer high quality service. Consequently, the price level of Thai spa has to be consistent with this positioning strategy.
- **A standard may add value** because it creates trust and guides the consumer. At first it has to be pointed out that Thai Spa World Class Standard can definitely be a value adding instrument for the Thai spa businesses. Especially because of the misleading image of Thai spa in European countries, a standard would be very helpful to guide the consumer and to help him in his decision when choosing a spa.
- Spa Standard requirements should be set high. Since there are great differences in the regulatory framework and cultural aspects between Thailand and European countries; hence, the founders of Thai Spa World Class Standard should be aware that **any standards applied to Europe have to comply with local sanitary and health standards as well.** In addition to compatibility with local law and regulations in Europe, the standard should strive to qualify the excellence of Thai spa service.
- **Certification and grading procedure could be revised.** In the initial stage when introducing the Thai Spa World Class Standard, the grading system (platinum, silver, gold), should be avoided since it may generate confusion among operators and customers. A single quality label for Thai spas is probably more easily applicable by the spa and more easily

identifiable by the users. From the standpoint of competition among structures and enforcement of the quality policy, certification should be maintained year by year and it would be better that it may be revoked at any time, according to a well-defined and rigorous procedure.

- **Investing in promotion of the Thai Spa Standard is crucial.** Information provision and high level of communication are necessary to promote the standard and create consumer awareness. Word-of-mouth advertising and the gift coupon business is the best way to attract new customers. That is because future customers trust in the experience and information they get from their friends and family. This process can be supported by offering an additional way – the Thai spa world class standard or a similar standard – which helps the consumer to choose a serious Thai spa business.

## **5.2 Recommendations**

In order to establish the Thai Spa World Class Standard in Europe there are many aspects to be considered:

### **5.2.1 Role of industry stakeholders and standard developers/managers**

- The standard has to comply with or exceed the requirements of local laws in each country, especially sanitary and health law. Therefore, an accurate analysis and continuous update of a regulation database and continuous review of new laws is necessary for a successful introduction of the standard in each country. A continuous effort to review and adapt the Thai spa standard to changing market conditions (over time and across countries) should be considered. Benchmarking studies and comparisons with other standards available in Europe may represent a valid practical approach.
- The inspection and control activities are crucial to maintain integrity of the system, to generate trust and to make the label able to add value. It is crucial that the Thai Spa World Class Standard certification is accessible to the spas that are able to comply with the requirements that can maintain high quality performance and further improve the service quality, in order to create trust among customers toward this certification. Therefore, adequate investments in system enforcement and in adopting an approach

to quality assurance based on third party certification may be an important move to improve the standard reputation. A critical review and more consistent allocation of responsibilities among key stakeholders such as Thai Ministry of Public, Thai spa Association, and professional accredited certification bodies, could be undertaken in order to empower the Thai standard in the interest of operators and consumers. The system put in place for the GLOBALGAP standard could be a possible model. In this system the standard owner (Ministry of Public Health) delegates inspection and certification activities to professional certification bodies (accredited according to ISO standard), while it maintains the overall surveillance responsibility and guarantees that inspectors are properly trained. Operators may apply to be certified according to the TSWC standard either directly, or through the Thai spa Association that would have the task to organize an internal quality system to implement inspections and control on its members (as option 2 in the GLOBALGAP scheme) in order to simplify certification procedures and to reduce the cost of operations.

- Improving networking and collaboration between Thai and European governmental bodies, and between Thai Spa Association and European Spa Associations, as well as with the local ones such as German Spa Association, French Spa Association, etc. and local Services and Tourist promotion sectors of each country could help to promote the Thai Spa World Class Standard and establish a good image of this certification.
- Investments in communication, promotion and advertising should be sufficient to achieve the objectives through appropriate actions. For instance, since awareness and knowledge of the Thai Spa World Class Standard is still limited at least in France and Italy, it is necessary to promote it through international trade fairs, associations, media that are appropriate to reach the professional target of spa managers and the consumer target of actual and prospective users. Joint actions able to pool the resources among Thai and European partners would be of mutual advantage.

### 5.2.2 Role of Thai Royal Government

The Office of Health Business Promotion, Department of Health Service Support, Ministry of Public Health, Thailand is a key player to establish a positive and trustworthy image of Thai spa in Europe through:

- Education and training. Qualification of persons who will hold masseur certification should be carefully supervised and validated. Synergies with other education and training organizations in the field (e.g., CIBTAC <http://www.cibtac.com/>) could be taken into consideration.
- Endorsement of highly qualified personnel. It can operate in order to allow persons who have real intention to work as masseurs in spas to go to Europe so as to establish serious business image for Thai spas and maintain the service quality of Thai masseurs.
- State Inspection and Verification bodies could be involved in the certification process, inspecting/auditing a sample of spa according to the standard as well as the certification bodies accredited to issue the certification.
- International mobility agreements. Mutual recognition of qualifications between Thai government and European government and discussion about 'health massage certification' would be crucial, since Thai health massage is considered to be an outstanding service which could differentiate Thai spas from European ones and the consumers give added-value to it. However, it is necessary to keep in mind that in Europe health massage can be performed only by persons who hold qualifications in physical medicine and rehabilitation and not by masseurs.
- Networking and support to SMEs. Government bodies can promote networking through co-financing and attending international spa trade fairs to collaborate in the promotion of the Thai Spa World Class Standard, with the aim to foster the creation of connections and to provide correct information to services and tourist promotion sectors in Europe.
- Research. Alternative medicine and traditional massage are experiencing increasing trends, but they lack of recognition by the official medicine for the lack of sound clinical research on the effectiveness of these techniques. Although Thai massage has a clear and recognized therapeutic character in Thailand, in Europe is known for its wellness character only.

Opportunities to test its features through funding medical research and clinical trials should be explored.

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## **6.2 Online publications and materials**

<http://ageconsearch.umn.edu> – Research in Agricultural & Applied Economics.

<http://www.colipa.eu> - Colipa the European Cosmetics Association

<http://www.emeraldinsight.com/> - Emerald Insight

<http://www.ingentaconnect.com/> - Ingenta connect

<http://onlinelibrary.wiley.com/> - Wiley Interscience

<http://online.sagepub.com/> - SAGE Journals Online

<http://www.sciencedirect.com/> - Science direct

<http://www.scopus.com/home.url> - Scopus

<http://springerlink.metapress.com/> - Springer Link

<http://www.thaispaassociation.com> – Thai Spa Association

<http://www.espa-ehv.com/> - European Spa Association

<http://www.federterme.it/> - Federazione Italiana delle Industrie Termali e delle Acqua Minerali Curative

<http://www.globalspasummit.org> – Global Spa Summit

<http://www.TÜV.com/it/index.html> - TÜV Rheinland

## **6.3 Major Trade Events**

- **European SPA** (Annual, spa & cosmetics)

**Date:** 12-SEP-11 to 14-SEP-11

European SPA is comprehensive European world of event for beauty and well-being. Last edition the exhibition welcomed more than 500 exhibitors from different parts of the globe. The event will features latest brands, the new skincare, the newest technologies and the most innovative ingredients for related industry. The trade show is being organized by ITEC France.

**Venue:** Porte de Versailles, Versailles, Ile-De-France, France

**Exhibitors:** 500+

**Organizer:** **ITEC France**

21 Boulevard Poissonniere, Paris, France

**Tel:**+(33)-(1)-44699569

- **Beyond Beauty Paris** (Annual, cosmetics & spa)

**Date:** 12-SEP-11 to 14-SEP-11

**Website:** <http://www.beyondbeautyparis.com/bbp/en/index.html>

Beyond Beauty Paris is one of the biggest European exhibition for beauty and well being industry. The event will showcase latest products for beauty. Fashion, esthetics, cosmetics and hair are the essential accessories of a fair. This premier trade is being organized by ITEC France.

**Venue:** Porte de Versailles, Versailles, Ile-De-France, France

**Exhibitors:** 500+

**Organizer:** **ITEC France**

21 Boulevard Poissonniere, Paris, France

**Tel:** +(33)-(1)-44699569

- **MONDIAL SPA & BEAUTE** (Annual, spa & cosmetics)

**Date:** 12-14 March 2011

**Place:** Paris, France

**Website:** [www.msbsparis.com](http://www.msbsparis.com)

Dedicated to the spa, wellness, beauty, cosmetics, make-up and nails professionals, the 2011 edition of the exhibition has gathered 13450 visitors in search of innovations, networking and exchanges.

**Exhibitors:** 181

**Visitors :** 13,450

- **Aquanale** (Annual)

**Date:** 26-OCT-11 to 29-OCT-11

**Website:** <http://www.aquanale.com/en/aquanale/home/index.php>

Aquanale-International Trade Fair for Sauna, Pool, Ambience. The decisive advantage for exhibitors and visitors: all the products and services connected with the pools, saunas, spas and wellness sectors will be presented together in a compact form in one attractive exhibition hall. Fair will have gross exhibition space of 22,500 square metres.

**Venue:** Cologne International Expocentre, Cologne, Nordrhein-Westfalen, Germany

**Exhibitors:** 271+

**Visitors:** 24,000+

**Covered Area:** 22,500 square metres

**Organizer:** **Koelnmesse GmbH**

Messeplatz 1 Koeln, Deutschland, Germany

**Tel:** +(49)-(221)-8212313

**Fax:** +(49)-(221)-8212105

- **Vivaness** (Annual)

**Date:** 15-FEB-12 to 18-FEB-12

**Website:** <http://www.vivaness.de/en/>

Vivaness is one of the major exhibitions to promote the affluent and increasingly health and beauty conscious market of Germany. It is the event for spas and wellness centres to promote themselves to the affluent and increasingly health and beauty conscious market.

**Venue:** Nuremberg Exhibition Centre, Nuremberg, Bayern, Germany

**Organizer:** **NurnbergMesse GmbH**

Messezentrum, 90471, Nuremberg, Germany

**Tel:**+(49)-(911)-86060000

**Fax:**+(49)-(911)-86068228

▪ **FIBO** (Annual)

**Date:** 14-APR-11 to 17-APR-11

**Website:** <http://www.fibo.de>

FIBO is the Leading International Trade Show for Fitness, Wellness and Health. More than 560 exhibitors present their latest products to the audience. Besides, the attractive supporting programme offers the visitors further education seminars as well as opportunities to get active at the conventions. The first two days of the trade show are for trade visitors only, the second two days also opened to the public.

**Venue:** Essen Exhibition Centre (Messe Essen), Essen, Nordrhein-Westfalen, Germany

**Exhibitors:** 560

**Visitors:** 50000+

**Covered Area:** 71,000 Square Meter

**Organizer:** **Reed Exhibitions Deutschland GmbH**

Voelkinger Strasse, Duesseldorf, Germany

**Tel:**+(49)-(211)-90191000

**Fax:**+(49)-(211)-90191123

▪ **Friseur+Kosmetik Event** (Annual, cosmetics & spa)

**Date:** 17-APR-11 to 17-APR-11

Friseur+Kosmetik Event International presents itself with current and into the future arranged contents. It is the largest and most important and attractive professional event for the beauty industry and spa sector. The event will be promoted to attract trade buyers from the region's beauty and health and fitness sectors, as well as top-end consumers by invitation.

**Venue:** GLOBANA TRADE CENTER LEIPZIG/HALLE, Leipzig, Sachsen, Germany

**Exhibitors:** 100

**Visitors:** 7,000

**Covered Area:** 10,000 Square Meter

**Organizer:** **Gs Expo GmbH**

Lindemannstrae-30, Dusseldorf, Germany

**Tel:**+(49)-(211)-30187600

**Fax:**+(49)-(211)-30187650

▪ **Esoteric fairs Ratingen**

**Date:** 09-SEP-11 to 11-SEP-11

The Esoteric Fairs Ratingen will be a great fair for the companies and business

groups dealing in the areas of alternative medicine, spirituality, wellness, nutrition, beauty and the seminar and the training will find a place to showcase their products & services to the customers coming from diverse of cultures. The Esoteric Fairs Ratingen will provide them a platform not only to showcase their products but also to interact with the customers. It will help the companies to review their business strategy and will help them to make their products and company brand in the field.

**Venue:** TBA, Ratingen, Nordrhein-Westfalen, Germany

**Organizer:** **ESO-Team Exhibition and Congress GmbH**

Verdi Strasse 7 81247 Munchen 81247 Munchen, Munich, Germany

**Tel:** +(+49)-(89)-8144022

- **RiminiWellness** (Annual)

**Date:** 12-MAY-11 to 15-MAY-11

**Website:** <http://www.riminiwellness.com/>

RiminiWellness is the one of the biggest exhibition for fitness & wellness services and facilities industry in Italy. The trade fair is designed for SPA centers, beauty farms, health clinics, sanatoriums, health resorts, therapists, schools & training centers representatives, and financial institutions. The RiminiWellness is being organized by Rimini Fiera S.p.A.

**Venue:** Rimini Fiera, Rimini, Emilia-Romagna, Italy

**Organizer:** **Rimini Fiera S.p.A.**

Via Emilia, 155, Rimini, Italy

**Tel:** +(39)-(541)-744111/744206

#### ***6.4 Key public and private players in the sector***

##### **European Spa Association (ESPA)**

ESPA-AETC-EHV

50, rue d'Arlon

B 1000 Bruxelles, Belgium

Tel: +32 2 2820558 Fax: +32 2 7330619

E-mail: [office@espa-ehv.eu](mailto:office@espa-ehv.eu)

[www.espa-ehv.com/](http://www.espa-ehv.com/)

ESPA's paramount job is to support and strengthen its members. Its objective is to maintain and develop the long-standing health resort culture in Europe and to align it within today's national medical systems and the EU.

##### **European Union of Swimming Pool and Spa Associations (EUSA)**

Avenue des Arts, 8

B 1210 Bruxelles, Belgium

E-mail: [info@eusaswim.eu](mailto:info@eusaswim.eu)

[www.eusaswim.eu](http://www.eusaswim.eu)

The European Union of Swimming Pool and Spa Association (EUSA) was founded in 2006 with its headquarters in Bruxelles. It represents craftsmen, the trade, wholesalers and the industry of the swimming pool and spa businesses in Europe.

**The European Audit Institute Wellness & SPA e.V.**

Eichenscheidtstr. 7

D-34537 Bad Wildungen, Belgium

Contact person: Dr. Hans Jörg Schmeisser, President

Tel: +49 05621 – 969625 Fax: +49 05621 – 969391

Email: [info@wellness-audits.eu](mailto:info@wellness-audits.eu)

[www.wellness-audits.eu](http://www.wellness-audits.eu)

**Federazione Italiana delle Industrie Termali e delle Acqua Minerali Curative**

Via Po, 22 - 00198 Roma

Tel. +39 06.8419416 Fax +39 06.85357562

[www.federterme.it/](http://www.federterme.it/)

**A.P.O.Di.B**

Via del Pascale, 4

12081 Benette CN, Italy

Tel: (+39) 345 8906130

Email: [info@apodib.it](mailto:info@apodib.it)

[www.apodib.it](http://www.apodib.it)

Association to safeguard of SPA operators

**Deutsche Gesellschaft für Hygiene und Mikrobiologie e.V.**

Medizinische Hochschule Hannover

Institut für Medizinische Mikrobiologie und Krankenhaushygiene

Carl-Neuberg-Str. 1

D-30625 Hannover, Germany

Tel: 0511 532 4655

Fax: 0511 532 4355

e-mail: [dghm@mh-hannover.de](mailto:dghm@mh-hannover.de)

[www.dghm.org](http://www.dghm.org)

**Deutscher Heilbäderverband e. V. (German Spa Association)**

Schumannstraße 111

D-53113 Bonn, Germany

Tel.: +49 228 201 200 Fax: +49 228 201 2041

Email: [info@dhv-bonn.de](mailto:info@dhv-bonn.de)

[www.deutscher-heilbaederverband.de](http://www.deutscher-heilbaederverband.de)

**Deutscher Heilbäderverband e.V. (German Association of Therapeutic Bath)**

Reinhardtstraße 46  
10117 Berlin, Germany  
Tel: +49 (0 30) 24 63 692-0  
E-mail: [info@dhv-berlin.de](mailto:info@dhv-berlin.de)  
[www.deutscher-heilbaederverband.de/cms/](http://www.deutscher-heilbaederverband.de/cms/)

**Deutscher Wellness Verband (German Wellness Association)**

Neusser Str. 35  
40219 Düsseldorf, Germany  
Tel. +49 (0)211 - 168 20 90  
Email: [info@wellnessverband.de](mailto:info@wellnessverband.de)  
[www.wellnessverband.de/](http://www.wellnessverband.de/)

**International Spa & Wellness Association e.V.**

Wilhelm-Mangels-Str. 22  
56410 Montabaur, Germany  
Tel : +49 02602-999 88 75      Fax : +49 02602-999 88 67  
Email : [info@iswa.de](mailto:info@iswa.de)  
[www.iswa.de](http://www.iswa.de)

**Deutscher Thai Spa Verband e.V. (German Thai Spa Association)**

Schulgraben 1  
34593 Knüllwald, Germany  
Tel: +49 5685 922 79 11      Fax: +49 5685 922 79 12  
E-Mail: [info@thai-spa-verband.de](mailto:info@thai-spa-verband.de)  
[www.thai-spa-verband.de](http://www.thai-spa-verband.de)

**Spas de France (French Spa Associations)**

[www.spasdefrance.fr](http://www.spasdefrance.fr)

**SPA-A (La Federation des professionnels du bien-être)**

[www.spa-a.com](http://www.spa-a.com)

SPA A s'adresse à tous les Professionnels du SPA, au personnel des centres SPA, soucieux d'acquérir de nouvelles compétences dans un milieu professionnel en perpétuelle évolution.

**Global Spa Summit**

257 Park Avenue South 10th Floor  
New York, New York 10010 -United States  
[www.globalspasummit.org](http://www.globalspasummit.org)

### **BISA SPA ASSOCIATION**

Winchet Hill, Goudhurst  
Kent TN17 1JY, UK  
Tel: (+44) 01622 791069  
E-mail: [spahouse@spaassociation.org.uk](mailto:spahouse@spaassociation.org.uk)  
[www.spaassociation.org.uk](http://www.spaassociation.org.uk)

BISA is the British International Spa Association, a non-profit association set up in 1998 by a group of professionals within the beauty, spa and education fields with a common aim – to promote minimum standards of quality and service within the spa industry, and to improve and promote education for spa therapists. The association is entirely self funding, and all members of the council are volunteers, giving their time and expertise free of charge.

The association sets standards for spas in two ways: education and health improvement. It ensures high level training for staff and promotes the benefits of spa treatments for clients. This approach is successfully establishing the standards of quality and service world-wide in the fast growing international spa industry.

### **BISA SPA ACCREDITATION**

SRF at Tower House, Tower Road  
Tadworth, Surrey – KT20 SQY UK  
E-mail: [srf@thespas.co.uk](mailto:srf@thespas.co.uk)  
[www.bisawaves.com](http://www.bisawaves.com)

The SRF is a non-profit making Fellowship that promotes education, research and scholarship into all aspects of recreational and health tourism including the use of mineral and spa waters. The Fellowship provides a forum for the conducting of such research and the dissemination of the results.

### **TÜV Rheinland AG**

Am Grauen Stein  
51105 Köln, Germany  
Tel. +49 (0) 221 / 806 - 0  
Fax +49 (0) 221 / 806 - 114  
E-Mail: [internet@de.tuv.com](mailto:internet@de.tuv.com)  
[http://www.tuv.com/en/corporate/home\\_2.jsp](http://www.tuv.com/en/corporate/home_2.jsp)

### **TÜV Italia (TÜV SÜD group)**

Via Carducci, 125 pal.23  
20099 Sesto S.Giovanni (MI), Italy  
Tel: +39 02 24130.1  
E-mail: [info@tuv.it](mailto:info@tuv.it)  
[www.tuv.it/home/default.asp](http://www.tuv.it/home/default.asp)

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Responsabile Formazione LPG Italia

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Via Augusto Murri 90 - 40137 Bologna

**6.5 Contact list**

***Kami Spa***

Country: *Italy*

Address: Via Degli Avignonesi 12, 00187 Roma

Web site: www.kamispa.com

E-mail: info@kamispa.com

Tel.: +39 06 42010039

Fax:

***Devarana Spa***

Country: *Italy*

Address: Via del Salviatino 21, Il Salviatino hotel 50137 Firenze

Web site: www.devaranaspa.com

E-mail: info@salviatino.com

Tel.: +39 055 9041111

Fax: +39 055 9041247

***Thai Si Royal Thai Spa***

Country: *Italy*

Address: Via Gasparotto Vecellio 56/a, Lovadina di Spresiano 31027 Treviso

Web site: www.thai-si.it

E-mail: benessere@thai-si.it

Tel.: +39 0422 881430

Fax: +39 0422 888098

***Thai Way SPA***

Country: ***Italy***

Address: Via Emilia Levante 482 / d, S. Lazzaro 40068 Bologna

Web site: [www.thaiway.it](http://www.thaiway.it)

E-mail: [info@thaiway.it](mailto:info@thaiway.it)

Tel.: +39 051 6259730

Fax:

***Baan Thai S.r.L.***

Country: ***Italy***

Address: Via borgo angelico 22/A, 00193 Roma

Web site: [www.baanthai.it](http://www.baanthai.it)

E-mail: [baan thai@baan thai.it](mailto:baan thai@baan thai.it)

Tel.: +39 0668809459 or +39 3401231331

Fax: +39 06 68809459

***LANNA GAIA***

Country: ***Italy***

Address: Via Doge D. Michiel 17/A, Lido 30126 Venice

Web site: [www.lannagaia.com](http://www.lannagaia.com)

E-mail: [info@lannagaia.com](mailto:info@lannagaia.com)

Tel.: +39 041 5269703

Fax:

***Nuadpheap Thai***

Country: ***Italy***

Address: via Acqui (Appio) 21, Roma

Web site: [www.puntothai.com](http://www.puntothai.com)

E-mail:

Tel.: +39 06 70614249 or +3920586661

Fax:

***Centro Benessere Sabai Thai Spa Bergamo***

Country: ***Italy***

Address: Via 20 Settembre 115, 24122 Bergamo

Web site: [www.sabaithaispa.com](http://www.sabaithaispa.com)

E-mail: [info@sabaithaispa.com](mailto:info@sabaithaispa.com)

Tel.: +39 035 230866

Fax:

***Thai Spa Mestre (Venezia)***

Country: ***Italy***

Address: Viale Ancona 37, Venezia Mestre 30172 Venice

Web site: -

E-mail: mail@thaispa.eu

Tel.: +39 041 5322956

Fax:

***Sawasdee***

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Address: Via Muzio Clementi 66-68, Roma

Web site: -

E-mail:

Tel.: +39 06 3241029

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***Silathai Thai Massage Center***

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Web site: www.silathaimassage.com

E-mail:

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***CENTRO BENESSERE THAILANDESE SENSIAM***

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Address: Via Orti 12, 20122 Milano

Web site: www.cittashop.it

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Tel.: +39 02.89281182

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***FONTEVERDE NATURAL SPA RESORT***

Country: ***Italy***

Address: LOCALITA' TERME 1, SAN CASCIANO DEI BAGNI 53040 Siena

Web site: www.fonteverdespa.com

E-mail: INFO@FONTEVERDESPA.COM

Tel.: +39 0578 57241

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***Principe Forte dei Marmi hotel and spa***

Country: ***Italy***

Address: Viale Amm. Morin 67, Forte dei Marmi 55042 Lucca

Web site: [www.principefortedeimarmi.com](http://www.principefortedeimarmi.com)

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***Assisi Wellness***

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***The DuParc Oriental Spa***

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Address: Residence DuParc 21, Corso Massimo D'Azeglio 10126 Torino

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***BAGNI DI PISA MEDICAL SPA RESORT***

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Fax: +39 050 8850401

**GROTTA GIUSTI NATURAL SPA RESORT**

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**ACANTO DAY SPA**

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E-mail: [info@acantospa.it](mailto:info@acantospa.it)

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Fax:

**TÜV Italia**

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**Cooperativa Bagnini Cervia**

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Web site: [www.laspiaggiadicervia.com](http://www.laspiaggiadicervia.com)

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**Confestetica**

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***Centro Benessere Fior di Loto***

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***Associazione Shin Wa Leader***

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E-mail: [settembrini@associazioneshinwaclub.it](mailto:settembrini@associazioneshinwaclub.it)

Tel.: +39 0229404540

Fax:

***Centro Yoga Yoko***

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Web site: [www.centroyogayoko.it](http://www.centroyogayoko.it)

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***Paradis d'Une Femme - Oriental Spa***

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Fax:

***L'Art du Massage Thai & du Spa***

Country: ***France***

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***Ban Thai Spa***

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E-mail:  
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Fax:

***Espace Capucins***

Country: **France**  
Address: rue des Capucins 14, 69001 Lyon  
Web site: [www.bienetre-espacecapucins-lyon.com](http://www.bienetre-espacecapucins-lyon.com)  
E-mail:  
Tel.: +33 04 78 30 86 19  
Fax:

***Spa Wellness Beauty***

Country: **France**  
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Web site: [www.wellnessbeauty.fr](http://www.wellnessbeauty.fr)  
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***Le Jardin D Epicure***

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Web site: [www.lejardindepicure.com](http://www.lejardindepicure.com)  
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***instant à soi***

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Web site: [www.instantasoi.com](http://www.instantasoi.com)

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***Thaï Rachawadee***

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***B-Zen Spa***

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***Thai Home Spa***

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***Zein Oriental Spa***

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***La Maison Guerlain***

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***Spa Vinotherapie® Caudalie***

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Fax:

***SPA ANNE FONTAINE***

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Fax:

***MassäG***

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Fax:

***MAXAM***

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Web site: [www.maxam.cc](http://www.maxam.cc)

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***Spa Comfort Zone Georges V***

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***Lovely spa***

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***Dream Castle Spa***

Country: ***France***

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***Andaman Spa***

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***Lanai Thai Massage Minden***

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***Chaba Thai Massage & Spa***

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Web site: [www.spachaba.de/](http://www.spachaba.de/)

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Tel.: +49 02 21 - 45 33 81 50

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***Tha-Sia Massage & Oriental Spa***

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***ASIA-THERME-Wellness-Spa GmbH***

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***JUST PURE Day Spa***

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***Spa in the City***

Country: **Germany**  
Address: N4 13-14, Mannheim 68161 Baden-Württemberg  
Web site: www.spa-in-the-city.de  
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Fax:

***Allgäu Sonne Medical Spa***

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Web site: www.allgaeu-sonne.de  
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***Emotion Spa München***

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***Emotion Spa Frankfurt***

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Web site: <http://frankfurt.emotionspa.de/>

E-mail: [e.gabriel@emotionspa.de](mailto:e.gabriel@emotionspa.de); [info@emotionspa.de](mailto:info@emotionspa.de)

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Fax: +49 (0) 69 - 63196783

***Arabella Spa München***

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E-mail: [info@arabellaspa.de](mailto:info@arabellaspa.de)

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Fax:

***Caribbean Day Spa***

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Web site: [www.caribbean-day-spa.de](http://www.caribbean-day-spa.de)

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***Sawan Spa***

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***Thaicraft Thaimassage Spa***

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***Aspria Spa & Sporting Club***

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***Stieber Beauty & Day Spa***

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Tel.: +49 06 11- 30 07 45

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***Babor Beauty Spa Inh. Ilka Lucas***

Country: ***Germany***

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***PALACE Day Spa & Cosmetics***

Country: ***Germany***

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***Die Villa Spa***

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***Heaven Spa Frankfurt***

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***Spa Eichenlaub***

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***Face and Body Spa Berlin***

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## **7. Annexes**

- 7.1 Appendix I Semi-structured interview outline
- 7.2 Appendix II Interview Summary reports

### 7.1 Appendix I Semi-structured interview outline

Topics of interest	Questions
1. Characteristics of Interviewee's business - Business type and customers - Business environment	Could you please explain something about your business? How long have you been in this business? Who is your target customers?
2. Degree of involvement and familiarity with Thai spa	What do you think about Thai spa? What come to your mind when I mention Thai spa? Have you ever adopt Thai spa into your business?
	If so, <ul style="list-style-type: none"> <li>✓ What are the strengths/weaknesses of Thai spa in comparison with the others?</li> <li>✓ What is the response of consumers to Thai spa?</li> <li>✓ What do they think about Thai spa?</li> <li>✓ What kind of image do Thai spa have?</li> <li>✓ What are important decision factors for the customers to choose Thai spa service?</li> </ul>
	If not, <ul style="list-style-type: none"> <li>✓ What is the spa type do you have?</li> <li>✓ What is the reason why you choose other types of spa instead of Thai spa?</li> </ul>
3. Degree of involvement and familiarity with spa standard (e.g. EU/private standard) through knowledge or experiences	Do you know any spa standard? Which one do you know? Have you ever adopted any spa standard in your business?
	If so, <ul style="list-style-type: none"> <li>✓ What is the standard you have been certified?</li> <li>✓ What do you do to be certified?</li> <li>✓ Did you find the difficulty to be approved?</li> <li>✓ What are the important issues when dealing with Spa standard certification application?</li> <li>✓ Does the customer recognize the spa standard certification you obtained?</li> <li>✓ What is the response of customers to spa standard?</li> </ul>
	If not, <ul style="list-style-type: none"> <li>✓ What is the reason why you do not adopt spa standard to your business?</li> </ul>

Topics of interest	Questions
4. Attitude toward spa standard	<p>What do you think about spa standard?            Do you think spa standard add value to the spa?            Is spa standard an advantage for spa business, to get acceptance from the customers?            How do European customers perceive spa standard?            Do they recognize the spa standard seal?            Do they understand the spa standard seal?            Do you think that spa standard certification may be an important attribute which customers take into consideration when choosing the spa service?</p> <p>If yes, why? / If no, why?</p>
5. Knowledge on Thai Spa World Class Standard	<p>Have you ever heard about Thai Spa World Class Standard?</p> <p>If so,</p> <ul style="list-style-type: none"> <li>✓ What do you think about Thai Spa World Class Standard?</li> <li>✓ What are the strengths/weaknesses of Thai Spa World Class Standard comparison with other spa standards you know?</li> </ul>
6. Attitude toward Thai spa and Thai Spa World Class Standard	<p>Do you think that Thai Spa World Class Standard may be an advantage for Thai spa business?</p> <p>If yes, why? / If no, why?</p> <p>What is your expectation toward Thai Spa World Class Standard? (e.g. safety, control, trust, etc.)</p>

## **7.2 Appendix II Interview Summary Reports**

### **7.2.1 France**

#### **a.1**

**Company:** FRA-SPA-01  
**Date and time:** March 23, 2011  
**Contact Person:** Owner

#### **Characteristics of Interviewee's business**

FRA-SPA-01 is a spa located in Paris and specialised in traditional Thai massage and beauty treatments. FRA-SPA-01 provides a wide range of services exclusively of Thai tradition. Main services are massages and beauty treatments as body and foot care, anti-age and facial treatments, using natural cosmetics of Thai trade mark PANPURI.

#### **Degree of involvement and familiarity with Thai spa**

FRA-SPA-01 is a well established Thai spa and is based on teachings of What Po School Thai Traditional Medical and Massage School.

#### **Familiarity with spa standard**

FRA-SPA-01 is not certified.

#### **Attitude toward spa standard**

The certification would be a great advantage to differentiate professional spa from the erotic massage centres that are confusing consumers. The so called "Thai erotic massage" are distorting the market and affecting the image of Thai spa in France.

#### **Knowledge on Thai Spa World Class Standard**

She knew about a new Thai spa standard even if she is not well-aware of characteristics of Thai Spa World Class Standard.

#### **Attitude toward Thai spa and Thai Spa World Class Standard**

FRA-SPA-01 is very interested to this standard because it would be a great opportunities to protect the global interests and image of quality Thailand products and services

## *a.2*

**Company:** FRA-SPA-02  
**Date and time:** March 23, 2011  
**Contact Person:** Owner

### **Characteristics of Interviewee's business**

FRA-SPA-02 groups and manages the spa of 6 prestigious five star Hotels located in Paris. FRA-SPA-02 is specialized in traditional Thai massage and beauty treatments using natural Thai cosmetic products. FRA-SPA-02 is affiliate to THAI MASSAGE CENTER of Chiang Mai, Thailand and provides training courses on Thai massages techniques in its spa. FRA-SPA-02 spa sells Thai traditional and organic products of Harrnn and Thann trade mark.

FRA-SPA-02 provides a wide range of specific Thai services including: traditional Thai massage, foot bath, as well as beauty treatments as manicures/pedicures, body wrap, facial treatments, waxing, etc.

### ***Customers***

FRA-SPA-02 is a well known spa and provides high quality services in a luxury ambience in hotel premises. The guests are seeking for top-level quality (e.g. kindness, top-class ambience, restaurant facilities).

### **Degree of involvement and familiarity with Thai spa**

FRA-SPA-02 owner knows very well Thai spa system as well as other spa system and massage techniques thanks to his participation to several training courses in many countries. He considers Thai spa system the best in the world.

### **Familiarity with spa standard**

FRA-SPA-02 was affiliated to "LABEL SPA" a French certification body. Actually it is not any longer certificated as Label spa was not well managed. The FRA-SPA-02's owner is "certified" as teacher of training courses on Thai massages.

### **Attitude toward spa standard**

The certification itself cannot be a guarantee of service' quality but it could help professional spa in distinguish from the mass of massage parlours. The image of Thai spa is positive however in Paris there several erotic massage parlours and this affects the image of traditional Thai massage. Some customers are confused and are not well aware about the well-being target of these practices.

**Knowledge on Thai Spa World Class Standard**

Thai Spa World Class Standard was unknown by the owner of FRA-SPA-02.

**Attitude toward Thai spa and Thai Spa World Class Standard**

The owner is very interested to be certified Thai Spa World Class Standard because as said he considers Thai spa as the best in the world. Therefore he has high trust on methods and rules of Thai spa certification and he is ready to be certified and monitored by a Thai certification body (best in this sector of any European certification body).

Major advantages will be for customers that would be more granted about the quality of services.

## **7.2.2 Italy**

### ***b.1***

**Company:** ITA-SPA-01

**Date and Time:** March 16, 2011

**Contact Person:** Owner

#### **Characteristics of Interviewee's business**

ITA-SPA-01 is a three years old spa located in the outskirts of Bologna. ITA-SPA-01 is specialized in traditional Thai massage and beauty treatments using natural Thai cosmetic products.

The majority of the staff is from Thailand to give to the customers an unforgettable experience and as much as possible similar to the treatments that could be provided in Thailand.

The range of specific Thai services provided by them is wide and includes traditional Thai massage, foot and hands massage, as well as beauty treatments as body and cellulite massage, peeling, nails treatments, relaxing rituals, wet and anti-age treatments, steam bath.

#### ***Customers***

ITA-SPA-01 is already a well known spa and accounts for a wide number of customers (some 400) not only from Bologna and its province. This spa takes care of the physical and mental wellness of their guests following the Thai philosophy seeking to improve interior harmony and exterior beauty of guests. The ideal guests are persons that have already experience and knowledge of spa services and in particular of Thai spa services to be able to appreciate the unique form and style of services.

#### **Degree of involvement and familiarity with Thai spa**

Thai Massage is a unique form of energy bodywork that leads to a deep release, helping the customers to rest from the stresses of everyday life. The owner personally experienced the benefits of Thai massage and other related techniques and decided to share her experience to other people.

Western style spa are focused on beauty and esthetic treatments only while oriental spa in general and Thai spa in particular are focused to provide wellness to guests by means of massage and other techniques and practices improving in turn the wellbeing and external beauty of guests.

Thai spa is unique in wellness treatment because its techniques are part of Thai culture and way of life transferred by parents to sons. In ITA-SPA-01, before any treatments it is practiced the ceremony of foot washing, as traditionally done in Thailand.

Therefore main weaknesses of Thai spa are related to the difficulties to transfer the “soul” of Thai spa and related services-techniques (as traditional Thai massage) to foreigners. Moreover the availability of qualified personnel is a second key issue of the activity also due to immigration restrictions of citizens from extra EU countries.

The image of Thai spa is positive and exactly related to the benefits of traditional Thai massage. The guests are seeking for top quality (e.g. atmosphere, natural kindness) despite the price of some services.

#### **Familiarity with spa standard**

ITA-SPA-01 doesn't have any quality standard. Moreover the owner is not aware of any certification for spa including Thai Spa World Class standard.

#### **Attitude toward spa standard**

Actually in Italy the spa sector is confused due to the high number of operators the majority of them are providing low quality services. The only way to consolidate the present position of ITA-SPA-01 is to continue to provide quality services to guests that are the sole judges of the quality of the service. The certification is not a guarantee of good services (as the case of organic fruits for example) and the results of certification could be seen in the long terms only. Obviously certification could give an advantage to Thai spa business and to certified Thai spa as consumers are more and more used to certifications and to trust to certifications.

There is no law regulating beauty farm, aesthetic centers or spas. The main differences are related to the number of services of different centres where spa is expected to be the more equipped and wide with water-related facilities.

#### **Knowledge on Thai Spa World Class Standard**

Thai Spa World Class Standard was unknown by the owner.

#### **Attitude toward Thai spa and Thai Spa World Class Standard**

However the most required advantage by would be an improved general image and better visibility to increase the number of customers. In addition it is expected

a transfer of knowhow from Thai institutions (by adopting Thai Spa World Class Standard) because they would promote Thai image and would give job opportunities to Thai people in Italy.

Finally the adoption of Thai Spa World Class Standard would guarantee the quality of end product of Thai spa and would be guarantee of safety for the customers.

## ***b.2***

**Company:** ITA-SPA-02

**Date and time:** Thursday 24 March 2011 at 18:00 – 18.30 pm

**Contact Person:** Manager

### **Characteristics of Interviewee's business**

#### **Business:**

Private wellness center, 3000 square meters wide, connected to a thermal establishment (Terme della Salvarola).

Main services: the center is structured in three main areas: a) cosmetic spa; b) traditional wellness techniques with the use of thermal pools; c) physiotherapy sector, connected with post traumatic recovery. Therapies and treatments are similar to those provided into traditional spas, with the use of thermal or non thermal water. There are thermal pools, relax areas (with hammam – Turkish bath, sauna and color therapy), aesthetic areas (providing visual and olfactory treatments and manual treatments).

The activity of the center can be also included between tourist activities for the development of the territory.

#### **Experiences:**

The activity of the center started in 1999. Since the beginning, the center is specialized in wellness treatments with thermal pools.

#### **Customers:**

The target is quite wide, and includes both ordinary customers and customers who need particular wellness treatments. The target can vary according to the cost of the provided service.

### **Degree of involvement and familiarity with Thai spa methods**

Interviewee doesn't know Thai spa typology, and doesn't think that in Italy there could be interest for such kind of spa.

## **Business features (strengths and weaknesses)**

### Strengths

- Use of thermal water (they can use water which directly comes from the spring)
- Dimensions of the center (quite big)
- Location
- Services provided

### Weaknesses

- Technical issues (thermal waters need to be warmed up)
- Operating costs
- Price. Price could be a limitation for the business, but considering the provided services and the quality of the services provided in comparison with other wellness centers, it can be also considered as a way to select final customers. So, it is not completely a weakness (price as a differentiation tool)

### Reasons to choose the traditional spa typology instead of Thai spa

- The typology of ITA-SPA-02 was innovative yet when the activity started in 1999 (almost nobody used pools in this field, and few people were used to wellness centers). The interviewee thinks that Thai spa are still not known in Italy and it could have been hazardous to access the market in 1999 with Thai spa typology. Final customers need time to get used to novelties, and the risk is that they are not willing to pay more for a kind of service they don't even know. The interviewee says that it took 2-3 years to make people aware and used to some kinds of services provided by them.

### Reasons to access the market with a "trail-blazing" approach in traditional spas' sector

- Knowledge of the trend; need to be able to anticipate trends and consumers' requests; need to avoid the risk to be late in approaching a new market segment

## **Awareness and knowledge about spa standards**

- The interviewee doesn't know any standard applicable to spas
- ITA-SPA-02 obtained the ISO 9001 certification, because it was asked by Emilia Romagna region. ISO 9001 certification (Quality System Management) is seen as a tool for differentiation: it sets rules to manage all the activities needed to carry on a business (procedures, customer care, etc), and for the interviewee it is a way to claim that in his spa high quality standards are in place.

- No sector-specific standards have been implemented because when the center approached the ISO 9001 certification, there were no sector specific standards on the market able to certify “product” quality. Anyway, the interviewee states that the center would not adopt any other standard, because of the costs and because the market doesn’t ask for these standards

### **Knowledge and opinion about Thai Spa World Class**

- The interviewee doesn’t know Thai Spa World Class
- Thai Spa World Class Standard could be advantageous for spas adopting it, as well as to belong to some well-known and well reputed networks
- Limitations to advantages could be: lack of knowledge about the provided products and services; no demand from the market for such kind of products and services; time needed to make consumers aware about new products and services
- Skeptic towards the success of Thai Spas in Italy, but positive attitude towards the introduction of the Thai Spa World Class standard, defining high quality levels of service and clear rules to differentiate businesses

### **Attitude towards spa standards**

- The interviewee thinks that each standard should include service quality (in a wide perspective): efficiency, professional staff, customer care, quality of the provided services (both on the wellness sector and on the physiotherapy sector)
- The interviewee says that he needs to know which are the concrete differences between spa standards and the standard he knows (ISO 9001), in order to express an opinion about the value of these spa standards
- Differences must be perceptible by operators (in order to understand what is the effective improvement introduced by spa standards) and especially by final customers
- The interviewee says that he has no expectations towards any spa standard (neither the European one) in order to define spa requirements. Anyway, in order to evaluate spas, he would take into consideration some features, like product quality, quality of the center, typologies of provided services, professionalism.

### **Perception of the standards (both in general and in spa sector) by final customers**

- Consumers don’t know certification standards
- In case of a well-known “brand” or seal which could stand for high quality level of spa, internationally or nationally recognized, it could be an added

value and it could be recognizable. Nowadays, there is nothing like that or nothing similar to what can be found, for example, in food sector. If the spa could be associated to a high quality well known network of spas, consumers could immediately associate the spa to the high level of quality and service provided, and could be able to give the right value to the “seal”. (*note: matter of reputation*)

- Seals or signs could be a differentiation sign, a selection criteria and a way to convey recognizability

### ***b.3***

**Sector:** Quality management of wellness industry  
**Date and time:** Friday 25 March 2011, at 10.15-10.50 am  
**Contact Person:** Dr.Roberto Ardizzi – Consultant, Auditor, Quality certification and Marketing

#### **Characteristics of Interviewee’s business**

He works as consultant, expert in quality management and safety, with particular reference to hotels, restaurants and bars. He has worked as an auditor of a project “Italian hospitality” or “Ospitalità Italiana”, to be promoted by the Italian Chambers of Commerce.

#### **Situation of spa in Italy**

The situation at present is very undifferentiated, there are massage, wellness centers, spas, with most of hotels giving beauty salon services, in some cases open 24 hours a day, but with no clear differentiation between such services.

The trend, at the moment, is to give more attention to the approach, which we will call “oriental” (e.g. appropriate welcoming, adequate environment) and to the supply of high quality services.

He mentioned that in his region, Abruzzo, there is an ongoing project to restart the spa and wellness centers, seen as a driving sector of the economy. The basic aim of such project is to create standards, rather than guidelines.

#### **Perception toward Thai spa**

Obviously, the Thai spa is something quite different. It might be of interest especially to those structures focusing on tourism business (which typically means structures far away from the areas of “relaxation tourism”, like seaside), but as the same time, easy to reach, providing parking, and, last but not least, additional services, like spas.

### **Perception toward Spa standard**

He underlines that standards can represent a point of strength and valorization of spas, toward the final customer. Furthermore, each country tends to create its own standard, but it is likely to go towards a certification.

Right now in Italy there are two bills concerning tanning centers, where the aspect of safety plays a crucial role. A standard developed abroad must necessarily cope with Italian standards for safety.

The certification is based, and integrates itself with the legislation, but cannot replace it; certification can, at best, establish closer and more stringent requirements.

In any case, the interest in certification is not a typical Italian interest, it is rather typical of Nordic countries such as Germany and Austria (e.g. certification on facilities for disabled people).

The real aim of a standard will not probably establish minimum requirements, but to serve as a definition of excellence. He also stresses the aspect of training in defining the quality standard.

### **Perception toward Thai Spa World Class Standard**

He said that the project on Thai spa World Class standard has been well designed, giving the staff training issue a central and decisive role. He sees no particular points of weakness in the project, maybe the very high standard (in particular the environmental standard number 5) could be a limit, but at the same time a point of strength.

#### Strengths

Differentiation represents the advantage of the project, as it makes no sense to replicate existing situations like the massage parlors, or otherwise defined, which are proliferating a bit everywhere.

The Thai spa must remain an elite standard. Thai spa can become an important segment in a niche (like the already mentioned in business tourism).

#### Threat

Any grading in certification (platinum, silver, gold), especially at an early stage, would only lead to confusion; moreover it could represent a communication problem. He said it is better to create a unique brand of quality "Thai spa", to be obtained by reaching a threshold score. This would be also a stimulus for competition among high level structures, pushing them to better the score.

From the standpoint of the competition between the structures, certification represent a sort of license to be maintained year after year and that may be revoked at any time.

#### ***b.4***

**Sector:** Spa certification expert  
**Date and time:** 8 April 2011  
**Contact Person:** Dr.Davide Baroncini– Division Manager of TÜV Italia Srl.

#### **Characteristics of Interviewee's business**

Dr. Baroncini is the responsible of Real Estate Business - Division Manager of TÜV Italia Srl.

TÜV Italia is a third party certification body located in Italy in different locations. TÜV Italia belong to TÜV which the central body is located in Munich (Germany). TÜV Italia covers a large amount of sectors both industries and services offering full service.

He has a strong work experience both in industrial and service sectors in the positions of quality and organization. He is potentially interested into dealing with all sectors (industry and service) that could be certified. Actually TÜV Italia is expanding its business in the tourism. However, they are meeting difficulties due to the huge number of brands which may difficult to reach good business performances.

Actually TÜV Italia is not to do business with SPA. When thinking about SPA, he thinks about "...looking someone to accompany me...". In addition, he when matches SPA and Thailand he thinks about "body care". They are interested versus THAI standards simply because is in the philosophy of TÜV Italia looking for every types of business.

However, in order to apply Thai standards in Thai SPA he thinks that is important to clarify:

- Identify who is really massage instructors or not
- Evaluate the border between massage effect and medical effect
- Ensure salubrity and hygiene of the SPA
- Safety of SPA.

Finally, he reveal that did not know the THAI Standard. However he mentioned that there is a general strong interest in SPA.

### 7.2.3 Germany

#### *c.1*

**Company:** Andaman Spa  
**Address:** Brandenburger Straße 1, 46145 Oberhausen, Germany  
**Date and time:** 21 March 2011, at 09.15 – 09.50  
**Contact Name:** Owner  
**Web:** <http://www.andaman.de/>

#### **Company description**

- Tradition Thai Massage, founded in 2008 in Duisburg. Opened a second studio in 2009 in Oberhausen.
- Employee: 8-12; it depends also on the holidays of the employees, some travel back to Thailand for 2-3 month. We have to be very flexible with the employees.
- We're developing from being a mere Thai massage studio to being a Spa and Wellness.
- Client: mixed clientele; also many young people, and even older people.

#### **Development of the Thai Spa sector in Germany**

- Strong development especially in the last years, since 2006.
- Most of the studios offer just Thai massage (like 99% in the opinion of the interviewee), nearly no one offers real Thai Spa.
- Most of the Thai massages studios are small business, with 1- 2 employees.
- There are high quality difference between the single massage studios. In this regard the qualification of the employees plays a major role.

#### **Strength and Weaknesses**

##### *a) Weaknesses*

- Generally the image of Thai Spa is less good among women.
- The first thought if you mention Thai Spa and massages always is about erotic massages and prostitution.
  - “This is an image problem we as a business really suffer from.”
- That's one reason why several Thai Spa businesses founded the German Thai Spa Association in 2009. Objective: create a positive image and make a marketing campaign to transfer a positive image of Thai Spa.

##### *b) Strength – what customers appreciate about Thai Spa*

- **Friendliness:** an advantage for the Thai Spa is the natural friendliness of the Thai employees: the smile of Asian people: clients feel comfortable at the Thai Spas.
- **Ambience:** stress free, holiday feeling; Asiatic ambience which creates an atmosphere of tranquility.
- A positive aspect for Thai Spa is that customers appreciate it very much, prefer it even over traditional German physiotherapy.
  - Traditional Thai Spa improves their health more than the German physiotherapy which is very impressive because for physiotherapy you can get a prescription from your doctor and it's paid by your health insurance.
  - But some clients say the only thing that helped was Thai massage therapy

#### **Marketing strategies to attract clients**

- Website; newsletter; in newspapers
- The most important strategy is the word-to-mouth ...
  - "The most new clients we get due to what our clients tell their friends or colleagues or families."
- **Create a nice ambience:** to be very friendly with the customers, create a stress free ambience; create a holiday feeling.

#### **STANDARDS: Qualification and certification**

##### ***a) Qualification and certification of the employees***

- It's important to be cautious when choosing the employees. Important to check very well their qualification.
- Some give a little bit more service (erotic massages) than they are supposed to.
- It's important to check that very accurately.
  - In Thailand you can buy a certification without even having a specific qualification.
  - *"That means, before I employ a new masseuse I let them give me a massage; that's the best way in my opinion to check their qualification."*
  - Currently there are so many different certification of different qualifications that it is hard to understand them.
- It's important to have qualified employees; employees that cannot impact your image as a serious studio.

**b) Qualification and certification of the business**

- A second important certification would be for our business itself.
- Therefore so far we don't have a standardized system.
- The qualification of our employees at the moment is the most important strategy to have a high quality business.

**c.2**

**Company:** Lanai Thai Massage  
**Address:** Bierpohlweg 159, 32425 Minden, Germany  
**Date and time:** 22 March 2011 at 19.00 – 19.30 pm  
**Contact Person:** Owner  
**Web:** [www.thai-massage-minden.de](http://www.thai-massage-minden.de)

**Characteristics of the company**

- Since 2008; manager is the wife of the interviewee, she's from Thailand.
- To improve seriousness at the beginning the massage business collaborated with a locally established hairdresser.
- In the beginning the company didn't have Spa, because they didn't have enough space. Meanwhile the business increased and they offer although Spa like body and facial peelings.
- Size: the business has three employees; they have 4-5 clients per day each, normally 4-5 hours; more would be difficult because the job is very exhausting.
- Waiting period: 4-6 weeks to get an appointment, 8 weeks for the weekends.
- Appreciated types of treatment: partner massages / Spas.

**Weaknesses and strength of Thai Spa and massage**

**a) Weakness: Cultural differences and language problems**

- Sometimes the Thai employees don't understand the western way of thinking; they come from a totally different cultural background.
- Together with other Thai Spas Lanai Spa offers trainings to the employees.
- The German Thai Spa Association was also founded with the aim to exchange opinions and experiences in regular meetings. It's especially important that the people from the association plus the Thai employees meet together and exchange ideas.
- Sometimes communication difficulties due to language insufficiency.

**b) Strengths:**

**Customers appreciation of Thai Spa and massage**

- Customers are very happy with the Thai Spa method.

- Thai Spa is getting very good feedback from the customers.

### ***Holistic approach***

- Advantage for Thai Massage and Spa is the holistic approach of the Asiatic massage.
- Thai massage takes much longer, from 90 minutes to two hours.
- In the beginning clients didn't want to invest so much time in massages, but they learned that 90 minutes massage is better.
- Benefit for the health is a huge advantage Thai Spa can exploit: customers say that they sometimes can benefit several days from a Thai Spa treatment. That's a reason why clients prefer Thai Spa over other types of Spa treatments.
- 5 senses: holistic; rooms decorated in an Asian style; Asian music; specific oils and fragrances; a tee after the Spa treatment.
- The European massage or others, like for example Hawaiian massage aren't holistic.

### **Qualification of the employees**

- The problem is that there are many Thai masseur that don't have a good qualification
  - *“Who learned it once somewhere on the beach and think they can open a Thai massage business in Germany.”*
- In the beginning, the interviewed Thai Spa was afraid of the competitors, but in the end if you offer good quality you will be better.
  - *“Some of our former employees tried to open a studio themselves but they aren't able to keep up the quality. We hear that from client, who tried the new Spa because they didn't want to wait 4 weeks for an appointment, and in the end they came back. So the quality counts.”*

### **How to attract customers**

- The best way to attract new customers is the word-of mouth advertising, the “coffee party” among women.
- Gift coupons: they were a very good way to attract new customers; the gift coupons helped to establish seriousness for the activity. 60-70% is gift coupon business. Clients liked their experience, bought a gift coupons for their friends etc.

### **Standards and certification**

- Hygiene is one of the most important aspects: what quality aspects should we use for a standard?
- It's important that the standard is comprehensible and traceable also for customers.
- The best would be to find an independent auditing service: it also depends on the costs.
- A standard could be a value added. The interviewee nevertheless isn't sure whether the customers will be impressed by it.
  - *“The customer will notice and say: ‘ah, ok, they are certified.’ The really crucial aspect is the first impression the client has when he opens the door.”*

### **German Thai Spa Association**

- Membership in the Thai Spa association is the first step towards a certified business. Membership in the association can function as a first step towards a quality certification because we work according to specific standards.

### **Certification of the Germany Hygiene Institute**

- The business of the interviewee has a certification from the German Hygiene Institute.
- You don't need to have this certification if you open a business.
- The most important aspect nevertheless is that the customer himself notices after a short moment if the studio is hygienic or dirty.
  - *“You can be certified but if your business isn't clean no one will believe you.”*

### **Certification of the instruction of the employees**

- The best thing would be if the massage and Spa techniques from Thailand could become the value of a real training with a final exam according to German standards.
- The effect would be that not everyone who wants to have a Thai Spa could do so; you first would have to give an exam.
- That would improve the quality and image of the whole business.
  - *“So not everyone who once learned it somewhere on the beach can give a Thai massage and Spa.”*

**Thai Spa World Class Standard**

- Interviewee thinks that they worked with this standard in their meetings at the German Thai Spa association.
- The association already established contacts to the Thai ministry of health.
- Last year we had a training seminar in Kassel, supported by the Thai ministry of health.