

## **General Session: A Look at the Japanese Spa Industry**

Tuesday, May 22<sup>nd</sup>

10:00AM – 10:30AM

Empire Room

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### **1. Trend of the Spa Market in Japan**

Today, every luxury hotel in Japan has spa facilities to survive and compete in the market. An especially, noticeable trend is that many hotel spas of international brand have launched mainly in the urban cities in these days. Besides, many of Japanese traditional Onsen hotels (Mineral Hot Springs with Japanese Inn) are trying to renovate to pull in more customers through support from the western investors. Some of the Onsens are trying to find the way to integrate both western concept of spa and Japanese concept of spa.

On the other hand, Bed Rock Sauna (Ganban-Yoku) is booming very much among the Japanese women. Health Land / Public Bath (SENTO) intends to expand their facilities and services for more relaxation oriented. Even the Retirement Care Houses are tending to have spa facilities.

As above-mentioned, we can say Japanese Spas have a variety of different facilities and services. But, there is no unified service standard and definition. Nobody knows the current situation as a whole of the spa industry in Japan.

Against the background of these situations, detailed study of spa services industry is needed in Japan. And we conducted the domestic and overseas research in the last fiscal year. According to the study, we found the spa-related market, such as the wellness and relaxation market, is growing very fast. The spa industry is growing fast and will be quite big in Japan. We estimate the market scale of spa services related market in Japan to be almost half of that in US and almost equal to that in the UK.

### **2. Characteristics of the Japanese Spa Services**

“Facial Treatment”, “Aromatherapy”, “Selling common cosmetics”, “Reflexology“, and “Shiatsu“ are now considered as the main services.

“Bed Rock Sauna (Ganban-Yoku)”, “Selling original brand cosmetics“, “Individual programs”, and “Thalassotherapy” are likely to be newly offered (I.e. invested in more).

“Facial Treatments” and “Aromatherapy” have been and will continue to be of high demand.

“Shiatsu” will be likely to decline in its popularity in the near future, though, it is now one of the popular services.

“Thai Traditional Massage” is likely to be newly offered though it is not so much popular now.

### **3. Issues on the Japanese Spa Therapists**

Of all spas, only 4 out of 10 employ spa therapists.

In employing, many spas tend to employ mid-career workers and/or part-time workers.

The facilities such as “Malls / Department Stores”, “City hotel”, and “Resort hotel” are more likely to employ spa therapists.

On the contrary, the facilities such as “Onsen with Japanese inn”, “Sports Gym (Fitness)”, and “Super-Sento” are less likely to employ spa therapists.

“Aromatherapy”, “Reflexology” and “Swedish Massage” are mainly offered by the therapists with major qualifications obtained in Japan.

“Thalassotherapy” and “Body wraps” are mainly offered by the therapists with “CIDESCO”, “JPN Esthetic Association Therapists” but Japanese national license.

“Shiatsu” is offered by the therapists with Japanese national license.

The facilities such as “Malls / Department Stores”, “Resort hotel” are more likely to employ new therapists in the future.

The facilities that offer “Fitness/Sport facilities”, “Other independent salons” and “Mineral Hot Springs (Onsen)” are less likely to employ new therapists in the future.

#### **4. Classified Informational Analysis in Detail Categories**

In the Modern Spa (Western Style) and the facilities such as City/Resort Hotels, Independent Buildings, Malls/Department stores and Beauty (Esthetic) Salons, the major target of customer’s age is around 30s and gender is mostly Female. The major services provided are Aromatherapy, Facial Treatment and Reflexology.

On the other hand, in the Old-traditional Spa (Japanese Style) in the facilities such as ONSEN hotels (Mineral Hot Springs with Japanese Inn) and Health Land / Public Bath (SENTO), the major segment of customer’s age is around 50s and gender is Male and Female. Major services provided are Shiatsu, Selling Cosmetics and Facial Treatment.

#### **5. For Harmonizing with the Global Spa Industry**

In Japan, there is no national definition for the term ‘spa’. Hence, the spa concept in Japan is not well established and nor is there a common view among the relevant people such as providers and customers.

Meantime, under the rapid growth of Spa industry, Japan will experience a severe shortage of spa therapists and managers. Therefore, it calls for urgent attention to enhance the human resources development.

However, due to lack of sense in the concept and definition, difficulties will arise in the proper education because various qualifications are provided indiscriminately. Worse, under the high job separation rate, we are facing to the difficulties in the career development of spa therapists.

Therefore, Japanese spa industry is now inviting the western spa industry regarding introduction of not only the services, but also the educational systems and the standards. Especially, I believe we would be better able to collaborate to create common guidelines, standards, and systems for education, qualifications (with job seekers support), in order to make mutual harmonization with the global standard.