

France: Feeling positive

If wellness is the key to a spa lifestyle, then the French spa market certainly appears to be practicing what it preaches. It is doing so well that, according to *The Global Spa Economy 2007 Report*, which was unveiled at the Global Spa Summit in New York City in May, it is the second biggest spa market in Europe, after Germany. With a total estimated revenue of \$2.299m, France is home to 2,746 spas. According to Cassandra Cavanah, executive director, SpaFinder Europe, Middle East & Africa, approximately four to five million French people visit a spa, around four to five times a year, and impressively, “50% of people aged 20-60 have experienced balneotherapy,” she says. Thermal centres and thalassotherapies have enjoyed a long tradition in France and such spas are well recognised for offering medical benefits. The country has unrivalled experience in the field of thalasso cures and thermal centres are sometimes even covered by health insurance. According to Diagonal Reports, thermes take around 30% of the total revenue generated by the spa businesses in France.

In line with the global wellness trend, the French spa market has enjoyed significant growth in recent years. Cavanah says: “The growth of the spa industry in France reflects similar growth spurts in other countries, like the US and the UK. A key reason for the growth is simply consumer demand.” As a result the market has been quick to expand its offerings and all spa sectors are upscaling, from traditional thalassotherapies which, according to Cavanah, have “improved their infrastructures to also include spa treatments,” to hotels, many of which have “added spas to their offerings and have boosted their marketing activities around the spa as they discover that their spa guests represent the highest revenue generators”.

Paris in particular is housing many exciting new projects which promise to raise the bar for spas. The Mandarin Oriental is opening a hotel spa, a Six Senses spa is opening at the Westin Hotel and fashion brand Anne Fontaine launched an innovative space last year that unites a boutique with a luxurious day spa.

Last month Paris welcomed the opening of the first Dior Institute. The Institute is located at the Plaza Athénée, a hotel which shares its address; the prestigious Avenue Montaigne – with the Christian Dior couture house. It is an avenue they have both helped make famous around the world - the hotel featured in the last two episodes of *Sex and the City* as well as in scenes from the film *The Devil Wears Prada*. According to Dior, the Institute will “fully represent the Dior skin care philosophy and expertise” and shares its philosophy with the Plaza Athénée: “To preserve the House's heritage in a place dedicated to awakening the senses, but always with sensibility and professionalism.”

Dior has already tested hands-on treatments available at two cabins located in shops in Paris, one at Le Bon Marché

and another at Le Printemps. Both offer treatments but the range offered at the Institute is considerably broader. The signature treatment is L'Or de Vie, a two hour ritual costing €490 and based on extracts of vine shoots from Château d'Yquem, known for their capacity to stimulate cellular renewal. And exclusive to the Plaza Athénée are two facial/body treatments called Chrono and Jambes en Apesanteur, as well as specific multi-day programmes for the Plaza's guests.

Last month was also significant for La Sultane de Saba, which opened a new spa in Vincennes in the eastern suburbs of Paris, while Caudalie is also rumoured to be opening a spa hotel in the Parisien suburbs soon.

Paris may be the most pampered when it comes to new spa activity but significant projects are popping up all over France. The Grand Hotel du Cap-Ferrat on the Côte d'Azur has embarked on an expansion project which will include 16 new rooms, eight new suites with individual plunge pools, and a 700 sqm spa facility, which will be equipped with an indoor swimming pool when it opens in early May 2009. And the Monte Carlo Spa has been expanded to include a 200 sqm space dedicated to face and body care from L'Oréal's recently launched luxury professional brand Kéraskin Esthetics. Clients can indulge in Kéraskin Esthetics Rituals which are designed for different skin's needs – such as the Four Seasons Cleansing treatment to help skin adapt to the changing climate of the seasons and Neojeunesse which offers an exclusive anti-ageing Fibro-Stimulation method. A “complete skin care management programme” is also offered comprising the brand's home-use spa products.

Swiss spa company After the Rain has expanded further in France too, signing an exclusive agreement in July with the Compagnie de Gestation Hôtelière to offer a full range of treatments, as well as its line of cosmetics, at the seven Spas & Beauté Montagne situated in the French Alps. Meanwhile

OFFERING MORE

“The French spa industry has been booming for five or six years now. All hotels are doing a spa trade too. Twenty years ago a four or five star hotel would have a couple of restaurants and a pool. Today the spa is as necessary as the pool – when you are opening a hotel you need to have a spa. There is also a big boom for spas in cities like Paris, where there are new places opening everywhere because everyone wants to have treatments. As a result, competition has grown tough. To be in the spa business you have to have everything. The consumer needs to know the positioning of the spa, it needs to be a good spa, with a sound concept – in terms of location, facilities, therapists and brands.”

Jocelyne Sibuet, founder of spa brand Pure Altitude and Les Fermes de Marie Hotel centres



Natural based
spa products are
booming in France

French marine spa brand, Daniel Jouvance, is expanding abroad this year with the opening of a new spa at the Hotel Medina in Morocco.

Brand boom

Spa products have been in a prime position to ride the boom. Cavanah tells ECM: "As spa has become more popular globally, there have been many French cosmetic brands that have opted to launch a spa component (Caudalie, Nuxe, Clarins etc)." Caudalie's Vinothérapie spas use the brand's own retail products and its latest entry is Vinoperfect Masque Révélateur d'Éclat, a radiance boosting mask that incorporates a brush to enable the formula to be applied over the face and neck, recalling the professional techniques used at Caudalie's spas. It contains viniferine, an active ingredient extracted from the sap of grapevine stalks to combat dark spots, and a gentle exfoliating grape acid and enzymatic exfoliant to promote cellular renewal.

L'Occitane En Provence is also going from strength to strength, stepping up its presence in the international spa market while maintaining its authentic natural positioning. Building on the success of its flagship spas in Paris, Hong Kong, Taipei and Sao Paulo and Comendatuba in Brazil, a L'Occitane spa has just opened in the luxurious Le Couvent des Minimes hotel in Mane en Provence. And in May this year it entered a global partnership with Hilton Hotels & Resorts to redesign the company's full service spas, menu of services and spa product offerings. The move is in line with Hilton Hotels Corporation's plans to invest around \$200m to develop 70 new spas throughout its portfolio of hotel brands. L'Occitane has been equally busy with acquisitions this year, buying M&A Santé Beauté with its organic cosmetics brand Melvita and private label business Ardecosm, and with many retail product launches. This has included revamping its Grape

range, which is inspired by techniques used in spas, with new formulations and new packaging. The brand developed a red vine leaf extract, to stimulate drainage, using vines from Puylobrier and Saint-Saturnin-lès-Apt near Manosque in Provence to ensure traceability of its active ingredients and strengthen its partnership with grape producers. The range also now includes revitalising organic grape juice, also from Provence. New products for 2008 include Enveloppement Chauffant Raisin, Bain de Beauté, Huile de Beauté and Gel Anti-Eau Raisin.

Hélène Sillinger, pioneer of the Tahitian Spa wave in Polynesia and founder of Helene's Spa and natural products believes that the way L'Occitane has grown its brand is exemplary. "The brand is developing but at the same time it is retaining its integrity and goals." Finding a way to develop a business while maintaining integrity is a challenge that Sillinger herself is embarking on as she seeks to find an efficient franchise partner who can help her develop her Tahitian concept around the world. Helene's Spa has been praised by the international press as being one of the most beautiful spas in the world, most recently being named number one spa for the Pacific Zone in Luxury Spa Finder's Annual Directory. And last year Sillinger launched her first product lines, Tahitian Emotions and Huiles Magiques at the Beyond Beauty exhibition in Paris. The product line prides itself on its natural positioning using authentic ingredients such as natural extract of Tahiti tiare flowers, tamanu oil, for its balancing and protective components, and Rea Tahiti roots, containing pro vitamin A and beta carotene. Products include beauty balms such as Tiare Tahiti Precious Balm, body scrubs like Lagoon White Sand Tahitian Body Scrub and the cleansing and toning Lime Frothing Foam. There are five Huiles Magiques, including Precious Monoi Oil with 100 Tiare Flowers to nourish skin and Sacred Tamanu Oil for tired or problem skin, stretch-marks, bites and sunburn. Sillinger comments: "Last year we were thinking of testing the market to see what the opportunities were and we realised that there are a lot of shops and distributors around the world who are very interested in high quality products made from a traditional recipe. A lot of ranges use the Tahitian name but they are not always authentic products. I then put everything into organising a more industrial rather than manual production and this year at Beyond Beauty we will be taking distribution for different countries."

Thémaé is another new brand to hit the French spa products market. Founders Guillaume Lefèvre and Bertrand Thiery opened a large lifestyle spa in Paris last year that combines French dermatology and spa expertise with the oriental and English tea traditions, and also launched a range of beauty products which have been available in the Beauty Room at Printemps Haussmann in Paris since May. The face and body care products are formulated with its Complexe des 4 Thés (4 Teas Elixir) – a blend of antioxidant green tea, regenerating white tea, soothing red tea, stimulating black tea and pure

spa products

spring water. Highlights in the face range include: Cérémonie Anti-âge, a multi-active day cream that promises to lift, tone and strengthen; Sérum Multi-actif, a lifting replenishing serum; and Thé d'Argile, a face mask that claims to detox the skin and eliminates red patches. For the body, Crème changeant Soyeuse is a hydrating treatment while an exfoliating treatment is offered by Gommage Thé au Nepal, containing red tea to hydrate and refine the texture of the skin. Further development is also on the cards for the brand, says Lefevre. "Our strategy is to have a selective development by building partnerships with spas, hotel spas, concept stores and department stores. Finding spas who would like to franchise our concept is a part of our strategy."

Organic or else

According to Diagonal Reports, the most frequent claims made by brands in the salon and spa channel are natural, bio and herbal. France may be riding the natural wave a little later than some countries but it has certainly caught up, offering an impressive and ever growing range of natural and organic spa products. "I think English or Australian brands are more advanced in the organic philosophy because it has been present in those countries longer. France is now doing organic, but a bit later than these other countries," says Sibuet. "At the moment everybody is excited about organic and there are many new organic lines on the market – at all levels. For many it is just marketing, but as new regulations are brought in for organic products, consumers are going to know what is in what they buy. The consumer has become the regulator."

Sibuet is behind the relaunch of the Pure Altitude spa brand and a new Bio-Organic range that has taken three years to develop. The brand was previously known as Les Fermes de Marie, taking its name from the flagship spa that Sibuet opened eight years ago in the Alps, but on developing the brand in other countries, including Spain and Asia, the company encountered some translation problems with the name so decided to take the name of one of its product lines which uses a high concentration of mountain plant ingredients – Pure Altitude. With the Bio-Organic range, which launches this month, Sibuet wanted to combine high-tech formulations with an organic and upscale positioning. "It is easier now to progress this sort of line. Three years ago organic products did not smell very nice and the ingredients on the market weren't the best." The new range is aimed at the intense regeneration of the skin, combining a complex called Sève de Vie (Sap of Life) incorporating: edelweiss, the leading ingredient in Pure Altitude products; Antarcticine, which acts to combat fine lines; silver birch sap to help maintain the skin's homeostatis; and Maca root to stimulate cell metabolism. There are two cleansers in the Ecocert certified range, three hydrating products and four regenerating products among which is Concentrice Sève de Vie for an intense treatment. Sibuet is now looking to strengthen the brand's position in France as well as its presence in international markets, "We have been growing like a niche brand but we entered

Thémaé is one of the newest spa brands to join the French market



Russia at the end of the summer, we are going into Japan this autumn and now have projects in Dubai and Switzerland." In addition, the sixth Pure Altitude spa opened last month in Sibuet's Cour de Loges hotel in Lyon.

The French spa market is certainly being massaged by a host of new names that are emerging every year. As a result, competition is increasingly intense but the established spa brands are meeting it with plenty of new developments of their own. According to Cavanah, the leading spa brands include Cinq Mondes and Sultane de Saba, (both of which are products used by many spas, she says), as well as Les Sens de Marrakech, Pevonia, Payot, Sothys, Esthederm, Phytomer and Les Charms d'Orient.

Cinq Mondes, which opened L'Espace Privé, a private access suite situated close to its Cinq Mondes spa in Paris, in September last year, has also opened two new spas in Casablanca and at Club Med in Mauritius. New product launches include crèmes for hands, feet and legs that are inspired by Chinese medicine. Crème Mains d'Ange contains extract of aloe vera, bamboo and Chinese white mulberry for soft and supple hands, feet are treated to the fresh and creamy texture of crème Pieds Tendres, containing extract of aloe vera, bamboo, shea, arnica and menthol, while heavy legs are offered long lasting relief by Crème Jambes et Pieds Légers, featuring aloe vera extract, bamboo, menthol, camphor and arnica.

Meanwhile, La Sultane de Saba, a spa brand inspired by the beauty rituals of the mystical Orient, Japan, Bali and Polynesia that is available in over 1,200 outlets worldwide, has recently launched Le Coffret Visage à l'Argan. This elegant box set contains four facial care products – Lait Demaquillant, Masque Visage, Crème de Jour Visage and Huile Visage – each containing a base of 100% argan oil, known for its anti-ageing qualities and ability to regenerate the epidermis and prevent the skin from drying out. The Coffret is designed to enable the customer to

recreate a facial care treatment in their own home to leave skin looking luminous.

Phytomer, which is available in 900 salons and spas in France, has added Ogénage Excellence to its skin care line up, promising to improve the skin's elasticity and resistance with marine calcium – a red algae extract. The brand also launched Décolleté Parfait to meet the specific needs of the neck and décolleté zone, with glasswort oil being incorporated into the formulation to help smooth the epidermis, while also containing an anti-dark spot complex. And for the body, Phytomer introduced Ab Sculptor, claimed to combat oxidative stress and increase fat combustion, thereby helping the abdomen to stay flat and the waist remain small. New treatments have also been introduced, Marine Pearls Facial, a moisturising treatment, and Trésor des Mers, a luxurious and relaxing full body massage that detoxifies and calms.

Competitor Guinot, which is now in around 1,700 salons and spas in France, has extended its Longue Vie range with Sérums Longue Vie, a product which should be used as a one month intensive treatment. Containing the Longue Vie Complex – which was originally formulated in a burns unit – as well as a host of other cell regenerating, firming and moisturising ingredients, the Sérums is designed to smooth away wrinkles.

Meanwhile Decléor has added two new facial care products to its Excellence range that launched last year. Ultra Regenerating Serum is a concentrate that aims to stimulate collagen for plumper and firmer looking skin, with a new Sol-collagenine Complex containing French white lupin. Baume Excellence is a 100% natural and preservative-free balm to use overnight.

Matis has focused on body care this year with Le Corps, an intensive firming body cream incorporating wild yam, omega 3 and 6 from blackcurrant oil, and Réponse Corps, new limited edition figure patches that provide a targeted action on localised fat, while optimising the effectiveness of Matis' slimming care product Réponse Corps Concentré Minceur Tri-actif.

At Thalgo latest developments include a new spa ritual called Ocean Memory, a range of anti-stress and revitalising body care treatments that use algae, salt crystals, seaweed petals and foam to replenish the body. A range of five Ocean Memory products have also been developed so that the ritual can be created at home – these are Deep Sea Scrub, Ocean Memory Cream, Revitalising Organic Tea and Ocean Memory room fragrance.

Activity may be at an all time high in the French spa market, but there are plenty of challenges ahead. Sillinger believes that we must be careful in how beauty is defined in the future. “All these years, beauty has been only about being young and thin. Beauty will be different in the years to come.” She notes how important it is for brands to maintain integrity. “We are looking for them to embody the spirit of the spa,” and for spas to focus on the spirit of the spa and its human power, rather than just the mechanics and machinery for treatments. “We are in a century where money is the first goal in life and the quality of spas suffers because of this,” she says, adding, “French spas are an

JUST FOR MEN

Though still a small category, men's spa products are getting increasingly important in France, particularly as treatments are becoming more popular. “More men are going to spas and booking monthly appointments to beat stress,” confirms Cassandra Cavanah, executive director, SpaFinder Europe, Middle East & Africa. Indeed, Decléor has decided that the time is right to relaunch its premium men's skin care range. Originally launched in 2000, the new Men's Essentials line offers reformulated products and a new look. The three-step programme aims to protect the skin while offering protection from daily aggressors. Exfoliant Peau Nette cleanses and gently exfoliates skin, Rasage Douceur is a smooth shaving foam, while protection is offered by two products, Soins Énergisants Visage and Soins Énergisants Yeux. An additional product, Aromessence Triple Action Rasage Protection is an essential oil formulation which can be used pre and post shave to soften and soothe the skin. Another new entry in the men's market comes from Guinot with Longue vie homme, an anti-ageing moisturiser within its Très Homme range. In addition to Guinot's Longue vie complex, it contains ederline, which acts to firm the skin and pentavitine to provide long-lasting hydration and a feeling of comfort.



example for premium spas around the world and I think the French spa market is going to evolve in a good way. But if the French focus on the idea that beauty is only about technology, then this could be to its detriment.”

Improvements are also needed in the categorisation of spas. Sibuet believes: “We need something for the consumer, some type of star rating. What does 'spa' mean? It is everything and nothing. A medical spa is a very different category to an organic cosmetic spa which focuses on energy and everything being natural.” Sillinger agrees: “At the moment all we have to judge a spa on before we go is how beautiful it looks and the range of treatments it offers. But consumers cannot know the exact reality of what they are going to get.” SpaFinder is paving the way with a widely used feature on its website that enables consumers to rate and comment on spas. Cavanah adds: “Every year our users nominate their favourite spas throughout the world in a number of categories. These accolades are coveted by spas around the world because they are voted by spa goers and hold a lot of cachet.”

The final mission is one of communication. Cavanah explains: “The industry as a whole has to continue to communicate to customers that spa should be part of their lives – that the spa lifestyle is more than just getting a massage and is the path to overall wellness.” It seems that finding the right balance is a goal that the French spa industry also needs to keep within its sights.