

Assuring Consumer Safety and Satisfaction through Recognition of Competencies of Service Providers.

1. Prelude

Two unfortunate incidents in Thailand within a week in December 2024 highlighted the risks of accidents and injuries, even fatal outcome, in physical treatments or services provided by untrained or careless service providers. Although there is no evidence of the two deaths in Thailand being directly related to massage, the unfortunate coincidence in the demise of two individuals after massage reminds us to be prudent and to mitigate any risk of an accident which may tarnish the reputation of the Wellness industry.

It is well established that **properly trained individuals can provide effective and beneficial beauty and wellness treatments**. The issue or risk is therefore not in the service or treatment but in the **required competency and knowledge of the therapist to execute a safe and satisfactory treatment**.

SWAS has resonated the need for competency guidelines and standards to various industry stakeholders, in different Beauty & Wellness (collectively under “Wellness”) services, since 2017. We urge all Wellness Services industry stakeholders to support the setting up of guidelines and standards for the industry to ensure

- **consistent performance,**
- **effective treatments,**
- **consumer safety and satisfaction,**

the bases on which Wellness service providers can build customer trust and competitive advantage for steady business growth and expansion.

2. Singapore Wellness Industry

The Wellness industry in Singapore consists of various segments including Beauty, Hair, Nail, Spa, Massage and Complementary Therapy.

Each segment is composed of Product/Equipment Sellers, Service Providers and Training Institutions. There are different training courses at various levels for a wide array of knowledge and skills to enable service providers acquired the competencies and recognitions required to perform services and treatments in a **Safe, Satisfactory and Professional manner**.

There is currently NO guidelines on the recognition of Professional Competency of Service Providers and Therapists in Singapore. PLRD only provides a list of recognised certifications for massage providers which vary from 60 hours to 2 years full time training. The list reminds us that recognised massage training is as low as 60 hours. The wide range of qualifications, disparity in training curriculums, scope and depth of knowledge and skills etc. is confusing to even stakeholders in the industry. Many business owners, learners and consumers are also misled by names of qualifications incorporating words like Diploma, Master, Specialist, Professional etc. which are not validated for the level of competencies.

Many service providers are representing themselves or their employees as Therapists, Specialists, Masters and Professionals without an accredited qualification or the competencies to provide the specific Beauty and Wellness treatments to consumers, thereby increasing the risks of injuries.

3. Advocation

SWAS, as the association representing the Beauty, Hair, Nail, Spa, Massage and Complementary Therapy (collectively under “Wellness”) service providers, **advocates the development of guidelines and standards on how Wellness Services may be provided and managed by Businesses and Service Providers.**

4. Circumstances

a) Operational Factor

The Wellness Services industry consist of labour intensive, brick and mortar businesses currently facing the following operating challenges:

- i. High operating expenses
- ii. Shortage of service providers
- iii. High remunerations and employment costs

Some business managers may view the challenges as environment factors in their financial statement. Entrepreneurs and business strategists may look at the challenges for opportunities to strengthen their own capabilities to develop differentiated competitive advantage. Service businesses must find ways to enhance the value of their high-cost business and employees.

Highly knowledgeable and skilled therapists are assets which businesses can use to develop new business, increase revenue and profits. **Accredited Qualifications** in Specific Treatments and Proficiency of Therapists with Verified Competencies assures consumers of **Safety and Satisfaction**; elements which enable Service Providers to develop and enhance **Customer Loyalty**

b) Economic Factors

The Global Wellness Institute's **2024 Wellness Economy Growth projections** show a steady growth in every sector of the Wellness industry from 2023 to 2028. The most significant being **Wellness Tourism** which is projected to grow 10.2% to reach a global market value of \$1.4 Trillion USD in 2028.

Wellness Economy Growth Projections 2023-2028

| | Market Size (US\$ billions) | | Projected Market Size (US\$ billions) | | | | | Projected Average Annual Growth Rate |
|--|--------------------------------|------------------|--|------------------|------------------|------------------|------------------|--|
| | 2019 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2023- 2028 |
| Personal Care & Beauty | \$1,071.9 | \$1,212.7 | \$1,268.3 | \$1,328.0 | \$1,392.7 | \$1,463.3 | \$1,535.2 | 4.8% |
| Healthy Eating, Nutrition, & Weight Loss | \$912.4 | \$1,095.7 | \$1,160.7 | \$1,238.7 | \$1,319.9 | \$1,403.8 | \$1,492.5 | 6.4% |
| Physical Activity | \$903.9 | \$1,059.7 | \$1,125.4 | \$1,194.9 | \$1,261.4 | \$1,333.4 | \$1,407.7 | 5.8% |
| Wellness Tourism | \$696.6 | \$830.2 | \$944.0 | \$1,049.2 | \$1,150.0 | \$1,249.8 | \$1,351.0 | 10.2% |
| Public Health, Prevention, & Personalized Medicine | \$443.9 | \$781.0 | \$827.5 | \$877.9 | \$931.4 | \$988.0 | \$1,047.6 | 6.1% |
| Wellness Real Estate | \$225.2 | \$438.2 | \$512.7 | \$608.3 | \$705.6 | \$807.2 | \$912.6 | 15.8% |
| Traditional & Complementary Medicine | \$483.0 | \$553.0 | \$577.3 | \$611.7 | \$646.2 | \$681.5 | \$718.4 | 5.4% |
| Mental Wellness | \$150.0 | \$232.6 | \$256.6 | \$286.3 | \$321.2 | \$364.9 | \$414.0 | 12.2% |
| Spas | \$116.3 | \$136.8 | \$148.1 | \$158.0 | \$167.1 | \$175.8 | \$184.3 | 6.1% |
| Thermal/Mineral Springs | \$65.8 | \$62.7 | \$69.6 | \$75.8 | \$83.1 | \$90.3 | \$97.6 | 9.2% |
| Workplace Wellness | \$51.8 | \$51.8 | \$52.7 | \$54.0 | \$56.0 | \$58.2 | \$60.3 | 3.1% |
| Wellness Economy | \$5,030.0 | \$6,321.2 | \$6,797.3 | \$7,321.9 | \$7,854.9 | \$8,411.6 | \$8,989.4 | 7.3% |

*Note: Figures do not sum to total due to overlap in segments.
Source: Global Wellness Institute estimates, based upon economic and industry sector projections from the IMF, ILO, Euromonitor, and GWI's data and projection model.*



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Singapore can benefit from a share of this substantial high growth economy consisting of hundreds of millions Wellness Tourists seeking services and products to enhance their lifestyle and wellness experience.

With the power of the internet and social media, consumer reviews and feedbacks etc. are far reaching and influential. Wellness services enthusiasts and discerned international Wellness Travellers are usually quick to share their views on value, in

terms of personal satisfaction, quality and standards in the services and products purchased as well as dissatisfaction, safety and competency concerns within their communities. Shared experiences of performance excellence or frustration may cumulate to affect the reputation of businesses and the industry in general.

c) Social Factor

The Wellness Services industry consists of over 6,000 business entities employing over 40,000 service providers. Due to the current shortage of skilled Singaporean workers, many of the service providers are Non-Singapore Residents.

- i. The **shortage of Singaporean workers** may be due a combination of the following:
 - Young Singaporeans' dislike for physical work
 - Lack of guidelines and standards for competencies and job scopes.
 - Lack of career development and progression pathways.
 - Confusion or ignorance of competency standards and training scope covered in the many different certifications. Often employers and workers are mismatched due to implicit assumptions of the business operation, job scopes and training covered in the courses.
 - Many employers do not hold advanced professional qualifications and are unable to understand or benefit from employees with advanced skills and qualifications to develop business with competitive advantage.
 - Low entry barrier for business startup resulting in many Singaporean workers wanting to venture on their own.
 - Bad reputation of certain sectors due to (unethical) actions of individuals dissuade new entrants.
- ii. **Businesses** are facing other challenges like:
 - Lack of guidelines and standards to setup or operate Beauty & Wellness businesses; anyone can claim and do almost anything to attract customers and close sales. Current phenomenon benefits the Price-Competitive entities with low overheads using low-skilled service providers and challenges the well setup entities employing qualified professionals to develop Differentiation strategies.
 - Lack of guidelines and standards on Services and Treatments Safety (other than Laser) in Spas and Salons. There is complacency in regulators; citing few serious injuries and no fatality reported in the Wellness industry. Most assumed that CASE has the situation under control. Others cited that guidelines will make it even more difficult for businesses to survive.
 - Lack of guidelines and standards for services and treatments with risk to personal health and injury. Currently, business can offer all kinds of services and treatments (other than laser and massage) and employ unqualified workers to provide the treatments.

- Lack of Competency Standards and Training Requirement for different levels of service providers and Therapists. Service providers can call themselves Therapists, Specialists, Experts etc. and provide intensive treatments without any accredited advanced qualifications, specialised training or experience. Many use unverified corporate or internal certification to support their claims as specialists in various services or treatments.

iii. **Challenges for Consumers**

- Consumers are mainly lay persons without technical knowledge about the services and treatments they purchase and rely on the businesses or service providers to recommend and provide the best products, solutions or practices based on their needs.
- Most consumers are not aware of any malpractices or errors in treatments until they are injured.
- Many consumers are misled by service providers to believe in “No Pain, No Gain” and are often injured by careless or unskilled service providers using the wrong products, techniques or excessive power (force) in treatments. The malpractice are usually excused by “No Pain, No Gain”!
- Consumers may be misled by service providers who claim to be able to treat all kinds of conditions and ailments. Many are untrained service providers and do not hold appropriate accredited qualifications. Consumers are often hoodwinked by service providers who presented themselves as professionals using unverified or low level skills certifications.
- Consumers of treatments using equipment are often injured by unqualified or careless service providers who ignored indications or contraindications or mishandled the protocols and equipment.
- Consumers do not have legal recourse for malpractice or injuries as there is no guideline or regulation on safety of Beauty and Wellness treatments. (Both CASE and PLRD referred complainants of injuries to SWAS) Consumers with visible injuries usually negotiate with service providers for compensation; some seek media exposure of their ordeal to pressurize service providers to compensate their sufferings.

5. Action Plan

To ensure the recognition of Well-Trained Service Providers and Therapists who holds accredited professional qualifications and differentiate them from the novices, SWAS proposed the following review and,

a) **Identification of the Types and Scope** of services provided by

- Businesses,
- Employees and Contractors, and
- Self-Employed service providers.

- b) **Differentiating the Roles and Responsibilities** of the different levels of Service Providers
- c) **Identifying and classifying the Level of Services** provided, for example:
- General relaxation,
 - Relief of stress, pain and discomfort,
 - Treatment of tension, muscle tightness, poor circulation etc.
 - Specialised Treatments e.g. Sports massage, Lymphatic drainage, Shiatsu, TCM Tuina, Moxibustion, Guasha, Womb care etc.
- d) **Identify Safety Risks**
- For example, if the service involves strong pressure, twisting, bending, application of force, use of elbows and knees etc. that may cause injury to the consumer.
- e) **Identify Underpinning Knowledge** required in providing the services, some examples are:
- Indications for the service or treatment.
 - Contraindications and who should not use the service or treatment.
 - Understanding of anatomy and physiology of the human body.
 - Method and protocols in providing the service or treatment to achieve the benefits claimed.
 - Common signs and symptoms of skin and health issues which may be contraindicated in the service or treatment.
 - Precautions required if consumer insisted on having the service.
- f) Enabling the Service Provider to **work Safely and Responsibly**.
- Working within own level of competency.
 - Working with other professionals and referrals
- g) Establishing **Competency Requirements** of Service Providers
- Identifying and matching **Training Requirements** according to Scope and Levels of Services provided
 - Identify and set **Training Specifications and Duration** (May align with those of UK, Australia, Japan, Thailand etc.)
 - Competency and continuous professional development
 - Planning Career advancement

6. Recognize Competency of Service Providers

There are many **Service Providers holding Accredited Qualifications** in Singapore including those of ITE (NITEC & Higher NITEC), RP (Diploma in Wellness, Lifestyle & Spa Management), WSQ (Certificate in Spa Services), TCMPB (Practising Certificate, Diploma in Tuina), Accredited foreign qualifications include the various certificates and diplomas in Beauty and Wellness services and treatments offered by CIBTAC, ITEC, BTEC, C&G, Panchkarma etc.

Each of the accredited qualification covers competencies for a Specific Service or Treatment at a certain level (there are 4 levels of proficiencies). The lower level courses cover only basic training for the specific service and the trainees upon completion of the course must work under close supervision. The scope and depth of training intensifies with each higher level of training.

Consumers and even some employers are not aware nor able to differentiate the different qualifications and competencies of Service Providers and Therapists. Their ignorance presents a risk when an incompetent service provider undertake a treatment which requires underpinning knowledge to make a **Professional Assessment and Provide Appropriate Treatment**.

- a. SWAS has set up a **Registry of Complementary Therapist** which provides all stakeholders easy access to the segment, type and level of competency of each registered service provider.
- b. Consumer can verify the competency of a service provider in order to **ensure Safety, Satisfaction and Value**.
- c. SWAS is currently working with two insurance brokers to explore how to offer more protection to stakeholders in case of accidents. The **Professional Indemnity Insurance and Public Liability Insurance** for the Wellness industry is designed to cover any accidents occurring in Spas, Salons, Services and Treatments.
- d. **Recognition of Professional Competencies**, Advanced levels of (accredited qualifications in) knowledge and skills, Continuous Professional Development (to update and upgrade competencies) **empower service providers to plan and develop careers in the Wellness industry**, excel in their professions and provide better Wellness treatments.

7. Moving Forward

The rapid development of the Wellness industry after COVID-19 is a clear indication of **Consumer Demand** for means to enhance physical and mental wellbeing. To ensure sustainable growth for Singapore's Wellness industry, Beauty and Wellness service providers have the responsibility to ensure that their customers or clients are safe and can benefit from the products, services and treatments purchased.

It is important that all service providers in the Wellness industry be well trained to discharge their responsibilities according to the level of training and accreditation.

SWAS proposes a review of various constitutions of **Consumer Safety and Competencies of Service Providers in the Beauty and Wellness Industry** and to identify the required guidelines for the Beauty and Wellness Services industry in Singapore. SWAS' review **benefits existing Service Providers and Therapists who hold accredited qualifications** to uphold their value and to develop competitive advantage. The **Standards and Guidelines enable Qualified Therapists to be recognised as Professionals** in their field of verified competencies.

SWAS wishes to invite all Beauty and Wellness business entities to participate in the review and development of an industry guideline to enable Safe and Satisfactory services and treatments for Consumers as well as better business and career development environment for stakeholders in the Beauty and Wellness Industry.

Those interested to participate in discussion groups may write to Wellness Standards, Secretariat@swas.sg.

Meetings will be scheduled from Mid February 2025. The tentative publication date of the guidelines (projected) is in 2027.

Specialists in Wellness Association Singapore.

www.SWAS.sg

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