



**GLOBAL WELLNESS  
SUMMIT 2018**

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GLOBAL WELLNESS SUMMIT  
**INDUSTRY BRIEFING  
PAPERS 2018**



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*Each year delegates attending the Global Wellness Summit are invited to summarize the state of the spa and wellness industries in their countries, and share that information in the form of an Industry Briefing Paper. This report aggregates all the Industry Briefing Paper submissions we have received in 2018.*



## ASIA INDIA

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### **1. What has been making news in this country in terms of the business of wellness?**

India is known as the birthplace of Ayurveda and yoga, and with the growing popularity of these holistic systems, more and more people are turning to these alternative systems for preventive care and maintenance of overall wellbeing. We are also seeing youngsters in their 20s and 30s choosing Ayurveda, yoga and meditation with the intention of adapting to healthy living. The industry is witnessing an influx of gyms, fitness apps and other such technologies to help consumers achieve their fitness goals, balance their work-life, and address both physical and mental health. There is also a growing demand for wellness travel—be it for a weekend de-stress program, a yoga retreat or a 21-day panchakarma detox. All this has opened more opportunities for start-ups and businesses in the area of wellness with new models, such as AyurUniverse, disrupting this sector. Whether it is for an Ayurveda therapy or yoga holiday, customers are looking for customization. Wellness-based apps offering yoga classes and Ayurveda DIY tips, for instance, are gaining popularity as they provide real-time information tailored to the customer's individual needs. Businesses are looking to take a more predictive approach with the use of technological advancements, such as artificial intelligence and algorithms, to personalize customer experience. The government of India is also looking to boost popular systems like Ayurveda and yoga as well as the lesser-known holistic systems, such as Siddha and Marma Chikitsa, to the global audience. The Ministry of AYUSH already exempts service tax from yoga schools and Ayurvedic hospitals. The need of the hour is for both private and government bodies to consolidate their efforts in boosting the sector to maximum benefit for the global wellness customers.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

There has been an influx of day spas offering modern and ancient beauty therapies across the country today. One of the reasons behind the increase in demand for the industry is the increasing aging population, growing awareness about health and beauty, and growing concerns about appearance, especially among the middle-aged and elderly.



## **COMPLEMENTARY & ALTERNATIVE MEDICINE**

The perception, attitude and usage of Ayurvedic products and medicines have changed immensely in the last few years with the launch and popularity of Ayurvedic products and medicines in the market. Companies, such as Patanjali, have changed the way people perceive alternative medicines.

## **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

There is a lot of investment in the health and nutrition industry with health apps, healthy meal delivery, and vegan or Sattvic restaurants on the rise. People are more conscious of what they are eating. This stems from the fact that most Indians like to have that guiding hand providing them with convenience and expertise rather than take a self-reliant approach.

## **SPA INDUSTRY**

Day spas offering traditional Ayurvedic therapies for relaxation are booming. From luxury spas to airport spas to spas in malls, Indians are seeking every opportunity to take some time out of their hectic schedules and pamper themselves. Even fitness centers and salons are offering different types of massages for those who want a break.

## **WELLNESS TOURISM**

The wellness industry is one of the fastest growing industries in India today. The Indian wellness industry was estimated at close to \$13 billion in 2015, with a growth expected at a CAGR of nearly 12 percent for the next five years, reaching \$23 billion by 2020. With significant scope for penetration in areas like nutrition, rejuvenation, ailment management and yoga, the Indian wellness market is a huge business opportunity waiting to be harnessed.

## **WORKPLACE WELLNESS**

The stressful and hectic lifestyles of corporates have made them more conscious about their health, and companies are turning to alternate wellness therapies and retreats for that much-needed break. Corporate wellness programs have also evolved with companies choosing to hire consultants to design specific programs based on individual requirements as well as by regularly inviting specialists to help employees manage their health better.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

The breathtaking speed at which the Indian market has opened to Ayurvedic products in recent years has been one of the most important new trends in the country. While Ayurveda and yoga have been part of the Indian culture for a long time, it was only in recent years that we have seen more mass acceptance of the use of Ayurvedic medicines and other products. While yoga and meditation have become part of all health clubs and gyms, there is also more awareness for the use of natural herbs and sattvic meals, especially among the younger generation. This demand for “all things natural” is manifested in different ways, including chemical free, organic, herbal or Ayurvedic! This not only validates the benefits of this age-old

wisdom, but we are seeing the new generation embrace this traditional science with greater ease.

**4. What do you see as the greatest strength of the wellness market in this country?**

Ayurveda is an ancient health care tradition that has been practiced in India for at least 5,000 years. The fundamental principle of Ayurveda is to maintain good health by combining healing massages, yoga, meditation and sattvic diets. Today, popular gurus from India are continuously promoting yoga and Ayurveda with the aim to spread the benefits of these authentic traditions, both inside the country and across the world. This requires that the highest level of teaching and practices. Ayurvedic products have become one of the largest businesses in India today. This is a testament to the growing awareness of Ayurveda, its foods and herbs and medicines, as they form the foundation for a healthy life.

**5. What do you see as the greatest weakness of the wellness market in this country?**

The lack of inventory/availability is one of the shortcomings the country faces today. This is mostly due to dependence on traditional markets for yoga in Rishikesh and Ayurveda in Kerala—while centers across the rest of the country are underutilized. The wellness industry in India is also a largely fragmented market with poor or no segmentation or standardization, making it hard for customers to choose the right wellness center or the right wellness program.

**6. What do you see as the biggest opportunity in the wellness market in this country?**

India has earned itself the status of a hub for medical tourists seeking ancient healthcare systems from around the world. The revival of yoga and Ayurveda in India is set to be a game changer for the wellness industry. From alternative medicine, nutrition, ailment management, yoga and corporate wellness, there are significant opportunities waiting to be harnessed. Today, health insurance companies are acknowledging traditional and alternative medicine, including Ayurvedic treatments; hence, the possibilities are limitless.

**7. What do you see as the biggest threat to the wellness market in this country?**

The discipline of Ayurveda has been traditionally passed down from generation to generation, where Vaidyars (Ayurvedic practitioners) have spent their entire life mastering the art of Ayurveda. Today, one of the biggest threats facing this age-old science of Ayurveda would be the dilution of its offerings. While we have seen yoga take on several new fads, such as hot yoga or beer yoga, short-term yoga teacher training programs and quick-fix panchakarma programs are being offered to customers, thus diluting the science and risking losing its authenticity.

**8. Which sector of the wellness economy are you most involved with?**

Wellness Tourism

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## ASIA

# ISRAEL

### **1. What has been making news in this country in terms of the business of wellness?**

In the business of wellness, I would say that health, wellness and medical technology is making news. Israel is known as “The Start-up Nation” with the second-largest number of start-up companies in the world (after the United States) and the largest number of NASDAQ-listed companies outside of North America. It is known for groundbreaking technologies and high-investment yields. The increasing trend in Israel of a healthy lifestyle brings with it many technology companies, accelerators and programs catered to the wellness industry. Today, you can find many start-ups in different areas, such as neuro-wellness, lifestyle, nutrition, sports, etc. Going hand in hand with the growing wellness technology companies, are many academic courses and degrees related to wellness than ever before. In addition, in the media, there is an increase in wellness magazines and more TV and radio programs about wellness and a healthy way of living.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

The beauty and anti-aging market in Israel is very developed, offering sophisticated and modern services, high-quality products and innovative technologies. Drawing on its abundance of natural resources and culture of innovation, Israel is continuing to distinguish itself in the cosmetics and toiletries sector with a range of remarkable offerings. Many utilize one of the country’s most prized natural resources—the Dead Sea. The Dead Sea, the lowest spot on Earth, contains unique salts and other rich minerals utilized for a wide variety of beauty and wellness products.

#### **COMPLEMENTARY & ALTERNATIVE MEDICINE**

Coinciding with the trend of a healthy lifestyle in Israel, there is an increase in the number of caregivers, schools and programs related to complementary and alternative medicine.

#### **FITNESS & MIND-BODY**

The fitness and mind-body market is quite developed and modern. There are approximately 1,700 gyms and fitness clubs in Israel—from local neighborhood clubs to big internationally known chains. It is estimated that 12 percent of the population train in clubs. In addition, there is a dramatic increase in the number of mobile apps and other technologies supporting the fitness and mind-body market.

## **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

In recent years, the Israeli population has become more conscious about their nutrition and weight. The abundant amount of natural, healthy ingredients makes it easier to hold a healthy lifestyle. However, we still do have the challenge of an overweight population in adults and children alike. Consequently, there are many programs run by schools and government institutions promoting health and weight loss programs. In addition, we have been witnessing an increase in vegetarians and vegans. All around the country you can find vegan and vegetarian restaurants and many vegan dishes in non-vegan restaurants.

## **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

Israel is one of the leaders in the world in digital health and medical device technology. It is also known for high-level doctors and treatments. However, there is still room to improve in preventative and personalized medicine and the public health sector, specifically increasing the awareness of the public and providing better service and accessibility.

## **SPA INDUSTRY**

You can find quite a few spas in Israel offering a variety of treatments. However, very few meet the level of customer care/service of international standards.

## **THERMAL/MINERAL SPRINGS**

There are very few simple locations.

## **WELLNESS LIFESTYLE REAL ESTATE**

Wellness lifestyle real estate has been developing slowly in the past few years both in the public and private sector. It is evident that a wellness lifestyle benefits real estate projects.

## **WELLNESS TOURISM**

Wellness tourism is on the rise from the north to the south of Israel. There are destination hotel and spas around the country promoting a healthy lifestyle, sports and healthy nutrition habits. Integrating technology to the sector gives wellness tourism in Israel an added value.

## **WORKPLACE WELLNESS**

Corporations big and small recognize the advantages of having a healthier and happier employee. The trend of having wellness programs in corporations is increasing with many in-house programs and exterior providers. Many integrate technology to promote corporate wellness, both by creating applications or by acquiring external services. This is a sector that is still just in the beginning stages. There aren't any large corporations that provide wellness programs to Israeli companies. There is a great market potential.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Israel is a world leader in agriculture technology, medical device, cybersecurity, artificial intelligence and more. Just recently it has discovered the wellness sector.

Many programs for entrepreneurs in the field have opened. I am sure that, in the next few years, there will be an increase in foreign investment in wellness technology.

**4. What do you see as the greatest strength of the wellness market in this country?**

The greatest strength of the Israeli wellness market is the innovative technology and fast adapting culture.

**5. What do you see as the greatest weakness of the wellness market in this country?**

In my opinion, the greatest weakness is the small size of the market.

**6. What do you see as the biggest opportunity in the wellness market in this country?**

The biggest opportunity in the wellness market in Israel is duplicating the success that Israel has had over the past years in creating groundbreaking technologies used by the entire world. The wellness market can take advantage of the developed, high-tech ecosystem and quickly emerge as world leaders in wellness.

**7. What do you see as the biggest threat to the wellness market in this country?**

The biggest threat is the tough competition in a small market.

**8. Which sector of the wellness economy are you most involved with?**

Wellness Technology

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## ASIA

# JAPAN

### **1. What has been making news in this country in terms of the business of wellness?**

While the inbound tourism market has been booming over the last several years, reaching 30 million people visiting Japan on an annual basis, the wellness tourism market is still in its early stage. There is a big potential for expansion, in particular in local areas with superb natural and historical assets.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **SPA INDUSTRY**

The current service format of traditional Japanese inns (Ryokan) does not meet the inbound customer needs and needs to be changed.

#### **WELLNESS TOURISM**

There is a big potential if we develop proper destination tourism in local areas with natural and traditional assets.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

The Japanese government is now strongly promoting the local tourism market, targeting the Tokyo Olympics in 2020.

### **4. What do you see as the greatest strength of the wellness market in this country?**

Beautiful natures, historical assets and spiritual culture, such as Zen.

### **5. What do you see as the greatest weakness of the wellness market in this country?**

We lack expertise and people with professional experience to develop the proper format of wellness tourism.

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

Destination and wellness tourism

### **7. What do you see as the biggest threat to the wellness market in this country?**

### **8. Which sector of the wellness economy are you most involved with?**

Wellness Tourism

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## ASIA

# JAPAN

### **1. What has been making news in this country in terms of the business of wellness?**

We have been hearing lots of news about the new records for Japanese athletes in various sports (including swimming, running, climbing, ball games, martial arts, surfing and skateboards), as we will have the 2020 Tokyo Olympic Games and the Paralympic Games two years later. Seizing this opportunity, the government and relevant industries are not only encouraging people's wellness activities but also boosting sports-related businesses. The Tokyo Metropolitan Government is betting on a 32.3 trillion yen (= approx. US \$290 billion) boost to the Japanese economy between 2013 through 2030. On the other hand, our long-held working behaviors have been changing since a labor reform law was introduced in June, setting a legal cap on overtime as one of its pillars. Therefore, many workers are using their leisure time to enhance their wellness life and spend time with their family or friends. This is a great chance to develop wellness movements and relevant industries.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

The research on iPS cells is quite active in Kyoto.

#### **FITNESS & MIND-BODY**

The fitness market in Japan keeps growing, and the annual turnover reached 461 billion yen (= US \$4.15 billion) in 2017. Recently, small fitness businesses, such as 24-hour gyms, circuit gyms for women only, hot yoga, kids' fitness and personal training gyms, are emerging. On the other hand, the customer target of full-scale fitness gyms is shifting to elderly people.

#### **THERMAL/MINERAL SPRINGS**

The international hot springs summit was held in Beppu, a famous hot springs town in May. This was a great step toward having a mutual understanding of hot spring cultures and to promote spa-related markets together with many of the international hot spring operators in the world.

#### **WELLNESS TOURISM**

Some leading Japanese resort hotels, including Aman, Hoshino and Fufu, launched their original immersion wellness programs or mindfulness programs. On the other hand, the government of Japan is planning to develop three full-scale integrated resorts (IR) like Marina Bay Sands and Resorts World Sentosa in Singapore. The wellness concepts and concrete services would be essential at those three IRs.

## **WORKPLACE WELLNESS**

Several major insurance companies launched new wellness policies that offer premium discounts or refunds to those living healthily. For example, Sumitomo Life Insurance Co. has joined with Discovery Ltd., an international financial services operator based in South Africa, to sell a new life or medical insurance policy that can be discounted if the insured takes steps toward leading a healthier life. The company will collect lifestyle data on the insured, including diet and fitness habits, and the premiums will be reviewed each year, with discounts available to policyholders recognized as adopting healthy lifestyles. The strength of this policy is that we will be able to utilize data that have been collected by Discovery from all around the world.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Many IT-related companies have been involved in creating innovative wellness technologies by utilizing AI, big-data, wearable /IoT, SNS, visual contents, VR/AR, Fintech (wellness points, etc.) and drone.

### **4. What do you see as the greatest strength of the wellness market in this country?**

- Technology
- Advanced research on iPS cells
- Healthy foods, bountiful natural resources
- Healthy habits that come from ancient cultures
- Longevity

### **5. What do you see as the greatest weakness of the wellness market in this country?**

The system of public health insurance for the whole nation is hampering the growth of the wellness industry in Japan.

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

There is great opportunity in regards to the 2020 Tokyo Olympic Games and the Paralympic Games and the rapidly aging society.

### **7. What do you see as the biggest threat to the wellness market in this country?**

Natural disasters, such as typhoons, earthquakes, tsunami and any problems that come from global warming.

### **8. Which sector of the wellness economy are you most involved with?**

Workplace Wellness

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## ASIA RUSSIA

### **1. What has been making news in this country in terms of the business of wellness?**

The professional community is fragmented. There is, perhaps, the only platform, the International SPA & Wellness Congress. Within the framework of the Congress, a competition is held that unites the market of spa and wellness industry and identifies the leaders.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **SPA INDUSTRY**

Thanks to the Spa and Wellness Development Council, important legislative standards and regulations are being adopted.

#### **THERMAL/MINERAL SPRINGS**

Russia has historically developed this area and over 300 years of history has accumulated a lot of experience. The country is actively working on the renovation of resorts.

#### **WELLNESS LIFESTYLE REAL ESTATE**

Due to the lack of modern construction standards and norms, unfortunately, this is not developed yet, but there is a great need.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

### **4. What do you see as the greatest strength of the wellness market in this country?**

Natural environment

### **5. What do you see as the greatest weakness of the wellness market in this country?**

Infrastructure

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

Wellness tourism: natural resorts and mineral/thermal resorts

**7. What do you see as the biggest threat to the wellness market in this country?**

Standards and regulations

**8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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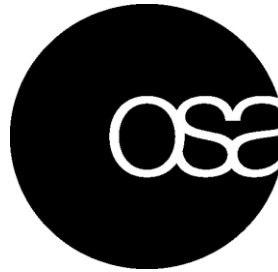
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## ASIA RUSSIA

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### **1. What has been making news in this country in terms of the business of wellness?**

The year 2018 is the anniversary of the two biggest professional events in Russia in the sphere of wellness:

- The 5th Spa and Wellness International Congress (SWIC) in Moscow (November 3-5). This is the only annual event addressed to owners, investors and managers, coming from Russia, the CIS, and the Baltic States.
- The 10th TOPSPAFEST (International Wellness and Spa Festival) in Sochi (September 10-20). This is 10 days of training, leisure and networking for managers (30%) and therapists (70%).

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

Growth in the popularity of natural approaches, such as manual aesthetic treatments based on massage techniques, natural beauty skin products, and nutritional beauty foods (many of which are produced in Russia).

Russian anti-aging medicine is based on preventive methods and is aimed at increasing the quality of life and life expectancy. There are several private anti-aging clinics and educational centers (mostly based in Moscow).

#### **COMPLEMENTARY & ALTERNATIVE MEDICINE**

Complementary and alternative medicine (such as homeopathy, phytotherapy, kinesiotherapy, osteopathy, aromatherapy, adapted Ayurveda) are popular in Russia (however, some of these therapies are not recognized by the official medical system). Our achievements over the current year:

- Osteopathy has become a licensed medical therapy.
- Professional aromatherapy (and in particular aromapsychology and aromatesting, and clinical aromatherapy and aromadiagnostics) has been recognized by academic medical institutions.

#### **FITNESS & MIND-BODY**

Fitness gadgets and fitness training for health purposes are in great demand. Fitness massages, a newly-developed type of manual massage, have become fully-licensed medical treatments. Fitness clubs are found almost everywhere and are widely affordable.

New purpose-oriented fitness communities have sprung up. For instance, a group called “#ПРОдвижениеTSF” was formed by wellness professionals in Russia and now includes members from 16 countries. The members walk from 100 kilometers a month for fitness purposes and actively participate in various social projects.

### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

There is a growing demand for eco and organic foods and, therefore, an increase in the number of health-food shops that also provide delivery services. There is also an increase in the number of providers of healthy “ready meals” for those who order food (mainly office workers) in accordance with their own daily or weekly nutritional requirements (weight-loss diets are losing popularity).

### **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

In the sector of public health, oncology is the top-priority issue of the year. With the involvement of the science and national pharmaceutical industries, President Putin has initiated the creation of a national program for the fight against cancer, with the aim of modernizing oncological centers and building a modern and comprehensive diagnostic and treatment system. Telemedicine acquired official legislative status on January 1. Preventive and personalized medicine is now officially recognized by the Russian Ministry of Health, which approved “The Concept of Predictive, Preventive and Personalized Medicine” in April 2018.

### **SPA INDUSTRY**

Many spas are undergoing renovations as they reconsider their concepts and implement more elements of wellness. The popularity of the Russian Bath Spa (banya) is constantly growing. Many new banyas are opening every year, and the profession of the banya therapist is in great demand.

### **THERMAL/MINERAL SPRINGS**

Private investors are actively building new resorts or are redeveloping existing facilities throughout Russia, where there are nine resort regions that included different climatic zones and all types of mineral waters. Modern resorts, the majority of which are located by mineral springs or by other natural curative resources, offer a variety of balneology, physiotherapy, health rehabilitation and prevention treatments as well as providing indoor and outdoor sports and leisure activities.

### **WELLNESS LIFESTYLE REAL ESTATE**

In general, property developers are paying more attention to the ecology of potential and future locations, to using natural building materials, and thinking about the ecological environment. For instance, even in the cheapest residential areas, fitness clubs are a must. The majority of elite residential villages include even more wellness facilities in their surroundings. However, the concept of wellness lifestyle real estate is still new to the market.

### **WELLNESS TOURISM**

The number of wellness tourists in Russia is growing every year. The most popular domestic resort destinations are Sochi, Caucasian Mineral Waters, Crimea and Altai. Modern and traditional resorts provide a high level of curative and wellness treatments. However, many Russians still choose foreign resorts for their better

quality of service and tourist infrastructure. Popular foreign destinations are Central and Eastern Europe, East and South Asia, and Belarus.

## **WORKPLACE WELLNESS**

The concept is new to the market, but foreign and large Russian corporations have started to offer wellness services to their employees. The most common services that are paid for by employers are access to fitness centers, medical insurance (including massage and physiotherapy coverage), and regular health checks. Sberbank, Russia (one of the leading banks in the country) offers their staff wellness zones at the workplace, sports facilities, showers and relaxation rooms. More and more companies are organizing corporate wellness retreats and other events with wellness in mind.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

The concept of a healthy lifestyle has suddenly become essential in the country, with its eager followers even found among millennials and the elderly:

- Healthy eating and regular exercise have become the norm for the majority of the active population.
- The movement toward wellness can be seen from the wish to fix aesthetics and health problems to the formation of healthy habits.
- Interest in wellness as a holistic system has brought out a demand for cosmetics with natural ingredients, yoga and meditation classes, healthy fast-food delivery, scientifically-based detox programs, and a desire for food supplements.
- The state health system and the health resort industry are working toward preventative and general-health rehabilitation measures to be available for the entire population. For instance, those over 18 years old are eligible for a free health checkup every three years.

### **4. What do you see as the greatest strength of the wellness market in this country?**

We benefit from traditional Russian balneology; we have the best manual massage in the world, and highly-educated medical professionals work in the spa industry as well as in complementary and alternative medicine.

### **5. What do you see as the greatest weakness of the wellness market in this country?**

We lack a systematic approach to concept development, service maintenance, and professional education (both for management and therapists).

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

The growth of the Russian wellness market will be boosted by the positive change in the mentality of the population towards wellness, by the increase in both life expectancy and the retirement age, and by improvements to the state health system.

### **7. What do you see as the biggest threat to the wellness market in this country?**

Undeveloped legislation, economic stagnation, and a low level of disposable income.



**8. Which sector of the wellness economy are you most involved with?**

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## ASIA

# THAILAND

### **1. What has been making news in this country in terms of the business of wellness?**

One of the largest events that dealt with the business of wellness to take place in Thailand over the past 12 months was the inclusion of wellness tourism in the Eastern Economic Corridor (EEC) initiative, which was put into place in Q1 2018. By offering numerous investment incentives, the EEC initiative should accelerate the development of wellness-focused businesses by both local and foreign investors in Rayong, Chonburi and Chachoengsao over the next three to five years.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **FITNESS & MIND-BODY**

Boutique fitness concepts continue to experience demand in major metros. Fitness-focused holidays in Thailand are popular.

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

People's interest in plant-based food products is growing, creating opportunities throughout the country for young entrepreneurs.

#### **WELLNESS LIFESTYLE REAL ESTATE**

Developers are starting to use the term "wellness" to promote their housing developments in and around Bangkok and other resort destinations.

#### **WELLNESS TOURISM**

Despite a strong Thai Baht throughout 2018 against a basket of popular currencies, global citizens, in growing numbers, continue to travel to Thailand to participate in wellness tourism experiences.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Thailand's wellness market continues to track the development of more mature wellness markets in Asia, including Hong Kong and Singapore. Recently, there has been a growing number of entrepreneurs, young and old, entering the wellness market through producing high-quality natural health food, health beverages, supplements and other lifestyle goods.

**4. What do you see as the greatest strength of the wellness market in this country?**

The greatest strengths of the wellness market in Thailand continue to be (1) the warm and sincere hospitality and the intuitive skill set of therapists and other practitioners, and (2) the value for money that the country offers.

**5. What do you see as the greatest weakness of the wellness market in this country?**

The greatest weaknesses of the wellness market in Thailand relate to the difficulties and costs that business people face when (1) trying to import health and wellness equipment and supplies from foreign markets; and (2) attracting, recruiting and retaining young graduates.

**6. What do you see as the biggest opportunity in the wellness market in this country?**

Thailand is rich in natural resources, and an opportunity in the wellness market in Thailand is to leverage the natural resources and current infrastructure to develop and produce natural and organic supplements, food products and lifestyle goods in a sustainable manner that can be distributed on a global scale.

**7. What do you see as the biggest threat to the wellness market in this country?**

The biggest threat to the wellness market in Thailand relates to the country's natural resources and the preservation of the same. The country must come together to protect and preserve Thailand's environment while still promoting business.

**8. Which sector of the wellness economy are you most involved with?**

Wellness Tourism

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## ASIA

# UNITED ARAB EMIRATES

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### **1. What has been making news in this country in terms of the business of wellness?**

The region's first full 360-degree holistic wellbeing resort has recently opened, guided by a strong feng shui philosophy. This is in addition to the Six Senses Spa in the Renaissance Downtown Dubai, which offers a "never-before-seen" sensory experience for the Middle East.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

Highly influential professionals continually drive and evolve this sector and assist the UAE to set the benchmark.

#### **FITNESS & MIND-BODY**

Unique fitness concepts, such as the global Ultimate Performance chain that opened in Dubai two years ago, has significantly proven the true meaning of fitness, diet and wellness.

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

This is a sector that still requires more attention and awareness.

#### **SPA INDUSTRY**

Professional spa operators

#### **WELLNESS LIFESTYLE REAL ESTATE**

The WorldCare Wellness Village is under development. To become an internationally recognized location of choice for quality healthcare and wellness services.

#### **WELLNESS TOURISM**

Exploding with more hotel developments that embrace wellness within their facilities, Healthcare City, and exclusive wellness resorts, such as The Retreat Palm Dubai.

#### **WORKPLACE WELLNESS**

More influence and SOPs from the government for all employers to prove their commitment to workplace wellness is still needed.

**3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Wellness real estate communities and residential wellness concepts

**4. What do you see as the greatest strength of the wellness market in this country?**

Accessibility and resources for future wellness developments—wellness destinations and resorts

**5. What do you see as the greatest weakness of the wellness market in this country?**

Consistency and onboard commitment

**6. What do you see as the biggest opportunity in the wellness market in this country?**

To encompass the regions deep history of Arabic traditional medicine and the core values of religion (five pillars of Islam), which have a significant relevance and relationship with wellness.

**7. What do you see as the biggest threat to the wellness market in this country?**

Lack of professionals, skills sets and knowledge to drive and operate wellness concepts to their full potential and in the right way.

**8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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## EUROPE

# FINLAND

### **1. What has been making news in this country in terms of the business of wellness?**

The increase of attendance among tourists as well as locals at public saunas in the Helsinki city area, such as Löyly, with the real smoke sauna, and Allas, with the sea pool (ice hole at winter time).

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

Pure arctic spring water and arctic cloudberry used in organic skin care products.

#### **FITNESS & MIND-BODY**

Creative approach to yoga that can be combined with anything.

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

The awareness of the value of organic and local food is increasing. Rye and oat fibers are being used in many ways.

#### **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

Personalized programs are developed by healthcare professionals for different professions and are funded by the state.

#### **SPA INDUSTRY**

Sauna at the lakeside is the Finnish spa. The 3.3 million private saunas make quite an industry in sauna tech and products.

#### **WELLNESS LIFESTYLE REAL ESTATE**

Naava's smart green walls for purifying indoor air. Sustainable water reprocessing. High-tech heating technology that recycles the heat to energy and back to the heating system. Building zero-emission houses is a trend.

#### **WELLNESS TOURISM**

Chinese and Japanese markets are rising.

## **WORKPLACE WELLNESS**

This is a number 1 priority in Finland. The latest development is an online health consultation form that also provides counseling in mental and physical wellbeing for employees. State and insurance companies refund the costs.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Sauna, forest bathing and swimming in the lake have been so natural for Finns, so it is quite eye-opening today that it has a business opportunity too.

### **4. What do you see as the greatest strength of the wellness market in this country?**

Pure nature with four seasons and the Lapland area.

### **5. What do you see as the greatest weakness of the wellness market in this country?**

Population 5.5 million

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

Sauna know-how. The country is not discovered yet.

### **7. What do you see as the biggest threat to the wellness market in this country?**

Small resources used in destination marketing compared with other Nordic countries.

### **8. Which sector of the wellness economy are you most involved with?**

Beauty & Anti-Aging

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## EUROPE

# FRANCE

### **1. What has been making news in this country in terms of the business of wellness?**

There have been many new wellness establishments in France in 2018, along with future projects. Among the most important: For Spas Hotels in France: The first semester of 2018 has seen a great number of hotel spa openings, demonstrating the sector's sustained dynamism. There are three French spots creating the buzz: 1) Champagne: The highly anticipated Royal Champagne Hotel & Spa in Reims. Over €30 million are believed to have been invested in this incredible renovation undertaken by an American couple, owners of Leclerc Briant champagnes. Overlooking Reims, the capital of the Champagne region, offering stunning views over the hills and located on an UNESCO World Heritage Site, this five-star hotel has 49 guest rooms (40-45 square meters) and every single one offers breathtaking views of the vineyards. The hotel will also have two restaurants, including a gastronomic one, and also a bar, three spacious terraces, a 1,500-square-meter spa in collaboration with Biologique Recherche and two swimming pools, and many lobby areas. 2) Paris: Hotel Lutetia & Fauchon: After four years of renovation, the Hotel Lutetia reopened its doors in June. The only luxury hotel this side of the River Seine is now a member of the highly select collection The Set (Conservatorium in Amsterdam and Café Royal in London). This renovation was orchestrated by renowned architect Jean-Michel Wilmotte, who set his sights on contemporary and ultra-chic interiors. Created from scratch for the "new" Lutetia, the Akasha Spa is a 700-square-meter luxurious haven of peace, offering a holistic approach based on the four elements (air, earth, water and fire) in addition to its sublime 17-meter pool. The spa has partnered with treatment experts Carita and the Swiss cosmeceutical brand Cellcosmet. The delicatessen Fauchon and upmarket hotel group Esprit de France have joined forces to create and operate the first Hotel Fauchon in the capital, scheduled to open this summer. The five-star hotel will be managed by Jérôme Montantème and takes up quarters in the brand's historic stronghold at 11 Place de la Madeleine. Located just a stone's throw from Rue Saint-Honoré, Place de la Concorde and major departments stores, this new address has been imagined by architect Richard Martinet, a true artist when it comes to luxury hotel design. The prestigious hotel will include 54 guest rooms, including 11 suites, all overlooking Place de la Madeleine or Boulevard Malesherbes and a Carita Spa. For the thalassotherapy, this sector has been recording continuous growth these past five years. This bright



spell has inspired municipalities along the coast to find investors so that they too can benefit from the highly sought-after blue gold. At a high-growth stage with its establishment on the Channel, an opening in Boulogne-sur-Mer (Pas-de-Calais) planned for 2019 (150 jobs, €50 million investment), Prévithal is keeping a watchful eye on this coastline. 2021: a new center in Berck. The building permit for the future residences Altéia, in the south of the seaside resort Berck, was approved last May, with opening scheduled for 2021. This 13,759-square-meter project, driven by the Quartz Group (Altéia's real estate developer), Créer Promotion (in charge of marketing) and the Relais Thalasso group, will include a hotel paired with a thalassotherapy center, accommodations and a restaurant. The creation of 80 jobs, 110 in high season, is also in the pipeline. For Thermal Spa: Nouveau Thermal Resort in Franche-Comté. This spring, the Caisse des Dépôts, Santenay Town Council and the Bourgogne-Franche-Comté Region presented a new project for a thermal resort and hotel residence with the operator Valvital. To fund the project, which requires a €13 million investment, the Caisse des Dépôts raised €1.4 million equity, and by doing so has reasserted its role as an investor in projects of public interest. A new stage for the future of balneotherapy in Châtel-Guyon began last July. Indeed, the group France Thermes has entrusted a construction company from the region, Eiffage Auvergne, with its balneotherapy resort project, and the building works were set in motion at the end of the summer. The project plans a unique site for this future 15,000-square-meter resort, with a new-generation, two-floor balneotherapy center and different integrated facilities, including a spa with indoor/outdoor pool and premium balneotherapy facility, a four-star tourism residence with 90 apartments, a restaurant with a 90-seating capacity that will also be open to nonresidents, a senior services residence with 60 apartments, and a research and training center dedicated to studying bacterial flora. The particularity of this innovative project is that the future establishment's numerous and varied purposes required carrying out specific, highly advanced studies before obtaining the final project's execution plans. By investing in these complementary facilities, France Thermes seeks the long-term positioning of balneotherapy in Châtel-Guyon by developing a specialized and attractive offering focused on preventive healthcare, digestive wellness and nutrition. The opening is planned for Spring 2020 with a global investment of €35 million. 2022: Grand Nancy Thermal. Last July, the Métropole du Grand Nancy intercommunal council announced its decision to choose ValVital to carry out the Grand Nancy Thermal project. This large-scale project will be located in the heart of Nancy and is poised to turn the Grand Est region into a key balneotherapy, wellness and leisure destination. Unique in France, the Grand Nancy Thermal will be a modern water-based facility for fitness, relaxation, wellbeing and health spread over 20,000 square meters with a health/sport center (2,459 square meters of pools and water leisure park), a wellness/health center (895 square meters of pools dedicated to wellbeing, built around a circular swimming pool), a balneotherapy center (329 square meters of pools and 85 treatment rooms, representing a client capacity of

15,000), as well as a residential hotel with 76 apartments enabling guests to directly access the facilities in their bathrobe. Cost of the project: €97 million.

**2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

**BEAUTY & ANTI-AGING**

Great growth of cosmeceutical brands, now essential in the spa offering in France. Cosmetic Revolution with The Great Creme by Biologique Recherche, inspired by Epigenetics.

**COMPLEMENTARY & ALTERNATIVE MEDICINE**

D-LAB, the French leader in nutricosmetics for beauty professionals for the last 10 years, launches the "Inner-Experience" concept, dedicated to spa hotels, to offer a new customer experience by inviting to nutritional journeys combining the pleasure of cosmetics to the delight of nutrition with an explicit base line "Feel Good - Eat clean."

**FITNESS & MIND-BODY**

With 2.8 million French practicing yoga regularly or occasionally, this is the number one wellness practice in France. The boom of diagnostic tools in fitness, such as the Beflow assessment, gives precise analysis of your health, including your level of fitness, stress, anxiety, motivation and analysis of body areas.

**HEALTHY EATING, NUTRITION & WEIGHT LOSS**

The food we eat will be healthy, fun and artistic. Millennials in France currently represent 16 million people and a third of the active population. In 2020, they will represent one in two workers. According to a recent study by Kantar, the first lesson to be learned is that in 2018, the millennial generation will combine healthy with guilty-pleasure foods for their daily meals: 15.6 is the average number of foods in the organic/green categories bought by millennials. In their shopping trolley, they will combine the basics for semi-homemade cooking with healthy products (organic produce, vegetables, herbal teas, fruit purées and cereals) to compose fresh, fun and colorful aperitif buffets, inspired by salad cakes, mermaid toasts and terrarium cakes, which have become all the rage.

**PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

The appetite for products designed to improve sleep is very high. Smart mattresses from Serta Simmons Bedding and offshoots Tomorrow Sleep and Eight Sleep include features that analyze REM cycles for up to two people in bed, wake you up via a smart alarm that knows when you're in a stage of light sleep, and allows you to control the temperature for optimal sleep climate.

**SPA INDUSTRY**

The wellness market is booming. There's further proof with the latest figures published by INSEE, confirming that the wellness market is growing by 7 percent each year, with 2 million French people regularly scheduling a spa visit, turning their back on beauty salons that, for the most part, fail to fulfill all their expectations.

## **THERMAL/MINERAL SPRINGS**

The thermal sector is growing fast and is also the driving force behind new investments (see our article “Balneotherapy, newfound health” in SoW#3). Between 2016 and 2020, €800 million could be mobilized (compared with investments of €400 million undertaken between 2010 and 2015). With the Grand Nancy Thermal Centre scheduled for 2020, the plan to relaunch Châtel-Guyon, the renovation of Thermes d'Allevard and Brides les Bains, the Thermal sector is likely to get extensive coverage.

## **WELLNESS LIFESTYLE REAL ESTATE**

Sustainable development has become a part of our business in 1995. In the field of hotels and hotel spas, 23 years later, we observe a multiple hotel offering, but with little “Eco Spa” put forward. Without wanting to create polemics, we must recognize that in our professions, ecology has difficulty in imposing itself. However, the subject has many interests both in terms of marketing and finance.

## **WELLNESS TOURISM**

Most people are looking to the southern regions and Austria if they want to take a wellness break.

## **WORKPLACE WELLNESS**

The notion of wellbeing at work is sometimes mobilized to talk about actions that have little impact on the actual organization of work in teams. This is the case, for example, of the provision of sports facilities, massage sessions or dietary advice. The procedures proposed by the INRS are of a different nature: They are part of the legal obligations to build a psychosocial risk prevention approach.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

1) The change from “Hotel & Spa” to “Spa & Wellness Resort” has become essential. Today, with the fast-growing trend for health-conscious trips, the spa is key to a hotel's value propositions if it is to attract this new customer segment, made up of high income, high-stressed city dwellers looking for healthy activities and options. A 5th consumer segment has emerged, alongside the classic segments of the hotel industry—leisure or business, individual or group business. Wellness travel is moving beyond its niche and can no longer be confined to a mere sub-segment of the individual leisure market. With specific interests and expectations, wellness-minded travelers now form a target in their own right for the “wellness resorts” of today and tomorrow. 2) The increase of specialized programs: Because wellness-minded programs not only integrate physical activity and healthy nutrition, but must also meet the need to reconnect body and mind, new disciplines taught by experts have emerged. Clients are introduced to yoga, tai-chi, qigong or meditation for more harmony and balance. 3) Physical activity at the heart of health and wellness programs: According to a survey conducted by Opinion Way, 85 percent of French people think thalassotherapy is particularly well-suited for both competitive and recreational athletes. For people looking to jump-start a fitness routine, improve their performance and recovery, or try out a new activity, the thalassotherapy break is the ideal moment for them to focus on their objective. 4) The increase of high-tech treatments: In many centers, technology is creating new ways to engage clients with

their wellness and increasingly specialized techniques are being used, integrated into a program or serving as diagnosis tools at the beginning of a stay. There are a certain number of equipment and tools, such as the OligoScan that measures an individual's needs in minerals and trace elements or the PhysioScan that claims to balance electromagnetic radiation. Clients hooked on high tech can now discover the Miltale (magneto-infrared laser technology), the infrared sauna, Fit 3D (360° image of the body, results interpreted by a sports coach), and even virtual reality.

#### **4. What do you see as the greatest strength of the wellness market in this country?**

France has a particularity in terms of wellness. They offer three concepts of health by water: thalassotherapy with seawater; thermal spa with spring water; and spa, the most recent but offers multiple experiences. Thanks to this unique expertise, France is now the 4th largest destination in terms of revenue. In 2017, there were 8.3 million wellness travelers in France, an increase of 5.5 percent per year.

#### **5. What do you see as the greatest weakness of the wellness market in this country?**

The diversity of the wellness offering in France is also its weakness, particularly when explaining the concept of thalassotherapy to foreign customers, which represents only 20 percent. The accessibility to certain destinations by direct air links is also a brake for foreign customers.

#### **6. What do you see as the biggest opportunity in the wellness market in this country?**

The wellness market has grown a lot in France in the past five years with many renovations in the field of thermal spa, but also the creation of many new spas since 2017. The number of spas increased by 47 percent between 2013 and 2017, registering an annual growth rate of 7.7 percent since 2007. France has 3,556 urban spas or accommodation, employing 70,232 employees and generating an income of 3.12 billion euros, making it in 4th place worldwide, while it was only 7th in 2007.

#### **7. What do you see as the biggest threat to the wellness market in this country?**

To continue to grow, the wellness market in France must absolutely appeal to foreign customers. Numerous promotional activities are conducted via the Cluster Atout France to promote wellbeing in the priority markets of Belgium and Switzerland, as well as Russia, which is part of the 2019 conquest objectives.

#### **8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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## EUROPE

# GERMANY

### **1. What has been making news in this country in terms of the business of wellness?**

More and more people are aware of the benefits of wellness for their health. The trend goes to shorter stays in wellness hotels but more often. The packages for treatments are often booked in advance. The trend is back to nature; therefore, regional-related treatments are often a USP.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

Especially for women, still very important, but the percentage of males booking these treatments is constantly growing.

#### **COMPLEMENTARY & ALTERNATIVE MEDICINE**

At the moment, very important because people are looking for things such as detoxification, alternative food, etc. The health factor is very important.

#### **FITNESS & MIND-BODY**

Take time for yourself. Taking a break is very important. Also, fitness concept/studios are still a growing industry.

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

As always, very important, especially eating healthier

#### **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

Still underestimated, and most people do not know that their health insurance has a lot to offer in this regard.

#### **SPA INDUSTRY**

Still growing

#### **THERMAL/MINERAL SPRINGS**

Those who invest regularly in new attraction are running very well.

#### **WELLNESS LIFESTYLE REAL ESTATE**

A pool and a sauna become more and more common for house owners.

## **WELLNESS TOURISM**

Most people are looking at the southern regions and Austria if they want to take a wellness break.

## **WORKPLACE WELLNESS**

At the moment, not very common

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Back to nature, healthy food and detoxification

### **4. What do you see as the greatest strength of the wellness market in this country?**

The quality of products is very high. The offerings are very broad, and people are ready to invest in their health.

### **5. What do you see as the greatest weakness of the wellness market in this country?**

Germans want to know details and measure everything, so often the positive effects of wellness are described or stated too easily: "It is good for you." There is a need to know why it is especially good for my personal needs. Selling wellness in hotels is often reduced to the spa counter, so guests need to go there to inform themselves.

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

People are getting older and live longer. Also, financially a lot are still potent in older ages, so they invest money to stay healthy. Therefore, the biggest opportunity is in health houses for older people.

### **7. What do you see as the biggest threat to the wellness market in this country?**

There is none if the quality stays high and the promises are kept.

### **8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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## EUROPE

# GERMANY

### **1. What has been making news in this country in terms of the business of wellness?**

Medical wellness is a growing market. Germans don't want to travel too far to have a healthy and unwinding retreat for ecological, safety and stress reasons.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

Beauty in combination with bio-cosmetics

#### **COMPLEMENTARY & ALTERNATIVE MEDICINE**

It comes more and more important because people realize that it is more sustainable.

#### **FITNESS & MIND-BODY**

Body fitness is more important for men and younger women.

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

Detox food must be delicious and is important in combination with slow food, bio food and local providers.

#### **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

Customers take more and more responsibility for their own health and spend their private money on preventive medicine, although they want some treatments to be paid back by health security.

#### **SPA INDUSTRY**

Spa functions on weekends for a short time out.

#### **THERMAL/MINERAL SPRINGS**

Natural healing products, such as mineral springs and mud baths, are asked if its authentic and coming from spa location.

#### **WELLNESS TOURISM**

English market is interested in medical wellness in combination with German medicine.

**3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

The hotel business is trying to offer medical wellness. The offers have mostly to do with beauty treatments.

**4. What do you see as the greatest strength of the wellness market in this country?**

German medicine has a high reputation and can be a market for the international market in combination with medical checkups, detox, nutrition and medical wellness.

**5. What do you see as the greatest weakness of the wellness market in this country?**

German wages for therapists are high in comparison to the international market. Germans don't spend money in their own country.

**6. What do you see as the biggest opportunity in the wellness market in this country?**

We have more than 80 million people living in Germany and are in the middle of Europe. Traveling in Germany is fast, secure and uncomplicated. Germany's medical know-how is renowned and can be combined with authentic treatments.

**7. What do you see as the biggest threat to the wellness market in this country?**

National and world economy

**8. Which sector of the wellness economy are you most involved with?**

Preventative & Personalized Medicine and Public

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**GRÄFLICHER PARK**  
HEALTH & BALANCE RESORT





## EUROPE

# HUNGARY

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**1. What has been making news in this country in terms of the business of wellness?**

**2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

### **BEAUTY & ANTI-AGING**

Intensive beauty spa product development in the past two years

### **COMPLEMENTARY & ALTERNATIVE MEDICINE**

More and more medical doctors have been involved in the complementary medicine sector; therefore, the professionalism of this sector is increasing.

### **FITNESS & MIND-BODY**

There are three times more fitness salons in the country in the past few years, some of them with significant spas.

### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

Manufacturers are starting to create healthier varieties of their products, including functional products helping to create health. The state tries to make unhealthy products pay more tax. Canteens have to use less sugar and salt and more vegetables. Starting this year in primary schools, the state is giving healthy food to the students for free.

### **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

Hungary has a good preventive medicine network for children, and the new minister responsible for health renewed the prevention system.

### **SPA INDUSTRY**

Spas with pool areas are built even for three-star hotels in the country, and more and more professional spa treatments are available.

### **THERMAL/MINERAL SPRINGS**

The modernization of the traditional thermal spas has finished. Some of them are an attraction onto themselves (e.g., Turkish baths in Budapest and Eger).

### **WELLNESS LIFESTYLE REAL ESTATE**

Wellness living communities are not common, but real estate developments with wellness programs are not rare.

## **WELLNESS TOURISM**

More and more wellness hotels exist in almost every part of the country, records in customers and revenue. The industry contributes a significant part for the GDP.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Healthy region developments: The government supports the non-spa developments of spa towns, and some of them try to form thermal regions—for example, Eger, the medieval city; Egerszalok with its salt hill; and Demjén with the cave spa and the new thermal lake.

### **4. What do you see as the greatest strength of the wellness market in this country?**

The government has finished the modernization of the traditional thermal baths in more than 50 cities. This is a good base for the whole tourism industry and has made the investment cheaper for the private sector—a smaller indoor spa is enough for a wellness hotel.

### **5. What do you see as the greatest weakness of the wellness market in this country?**

Despite the strong traditional medical background of the thermal spa industry, no medical coordination is in the sector. This is a problem if we consider the world trend of evidence-based wellness.

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

Despite the strong traditions of quality wine production and a lot of thermal waters in wine countries, Hungary has very few wine spa hotels (in Tokaj, Balaton and Villány). Wine spa hotels, with the Central-European spa tradition, could be among the market leaders in the world.

### **7. What do you see as the biggest threat to the wellness market in this country?**

No real threat exists according to the latest figures. There are traditional spa towns without relevant five-star hotels, including Heviz, Hajdúszoboszló and the Eger thermal region. The lack of the top segment causes smaller margins.

### **8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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## EUROPE

# Italy

### **1. What has been making news in this country in terms of the business of wellness?**

Natural healing approaches and the awareness of the necessity to invest in one's health. More attention has been on the value of global health (physical and mental) rather than just the external appearance. Going to the spa is no more just a status symbol but a real deep and conscious choice.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

People often think anti-aging is only an aesthetic issue, while it is instead a combination of several factors, where aesthetics is just one of them.

#### **FITNESS & MIND-BODY**

Movement and stress management, together with nutrition, are the pillars of every kind of preventive protocol.

#### **HEALTHY EATING, NUTRITION, & WEIGHT LOSS**

People, professionals and governments are more and more aware that an effective prevention has to be based on correct nutrition, not only for weight loss but also for its anti-inflammatory effects.

#### **PREVENTATIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

Thermal resorts will play an important role in government welfare projects in order to prevent noncommunicable diseases (NCDs) and improve healthy life over 65.

#### **THERMAL/MINERAL SPRINGS**

The anti-inflammatory effects of hot mineral spring water ideally combine to the up-to-date discovery of evidence-based medicine, which identifies inflammation as the silent killer causing several serious chronic NCDs.

#### **WELLNESS TOURISM**

I think, especially for thermal resorts, it will be a good opportunity for business in the coming years.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Prevention of NCDs through thermal and wellness-related approaches

**4. What do you see as the greatest strength of the wellness market in this country?**

Centuries-old traditions in healthcare through thermal therapies and medical approach on-site

**5. What do you see as the greatest weakness of the wellness market in this country?**

Strict and complex regulation and heavy and expensive business model for thermal spas. Lack of regulation for wellness centers, which leads to an unfair market competition.

**6. What do you see as the biggest opportunity in the wellness market in this country?**

Wellness tourism  
Prevention awareness development

**7. What do you see as the biggest threat to the wellness market in this country?**

Fast developing competitive countries and uncertain international financial and economic situation

**8. Which sector of the wellness economy are you most involved with?**

Thermal/Mineral Springs

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## EUROPE ITALY

### **1. What has been making news in this country in terms of the business of wellness?**

The growing desire for private spas in hotels, and the possibility, through the latest steam technology of effegibi, to convert a regular shower into a professional steam shower.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

The "Bio wave" has also entered into the beauty world. It is not only reserved for women, but men are also attentive to their beauty and anti-aging care.

#### **COMPLEMENTARY & ALTERNATIVE MEDICINE**

Unfortunately, alternative medicine is not officially recognized by the Italian government, but in reality, many people are interested in it.

#### **FITNESS & MIND-BODY**

The existing fitness centers are upgrading their services with mindfulness solutions.

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

More visible attention in the social life (magazines, schools, fitness centers)

#### **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

The health system foresees preventive and personalized wellness treatment in thermal structure.

#### **SPA INDUSTRY**

Still growing

#### **THERMAL/MINERAL SPRINGS**

Italy is historically the country of thermal/mineral springs, so it is part of our culture and life.

#### **WELLNESS LIFESTYLE REAL ESTATE**

Sauna and private steam in the shower are becoming a real need.

#### **WELLNESS TOURISM**

Until a few years ago, it was just for middle-aged people to benefit from thermal treatment; now, even the younger generation is enjoying the pleasure of a spa.

## **WORKPLACE WELLNESS**

Still to be improved

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Private steam room in hotels and private houses, and the attention to a more natural environment

### **4. What do you see as the greatest strength of the wellness market in this country?**

People are investing more time and money in wellness due to increased awareness.

### **5. What do you see as the greatest weakness of the wellness market in this country?**

Lack of professional people in the public wellness area

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

Satisfy, in a professional way, the request of people already aware of the wellness benefit and reach the people that are not conscious yet. Expand the knowledge of the wellness advantages.

### **7. What do you see as the biggest threat to the wellness market in this country?**

The presence of unfair and unprofessional players

### **8. Which sector of the wellness economy are you most involved with?**

Other (please specify):

Sauna, Steam Room and Spa manufacture

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PERFECT WELLNESS



## EUROPE

# MONACO

### **1. What has been making news in this country in terms of the business of wellness?**

The Principality of Monaco has become one of the founding members and sits on the board of the Wellness Tourism Association. Monaco is also the first destination marketing organization (DMO) to become a member.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

The Thermes Marins Monte-Carlo is the first and only spa in Europe to offer cryotherapy, of which one of the benefits is prolonging life. Also, Monaco has been the home for over 16 years of the Aesthetic and Anti-aging Medicine World Congress.

#### **FITNESS & MIND-BODY**

Apart from the excellent workout facilities at our spas, one can enjoy Mother Nature's gym. Yoga is becoming more and more popular in Monaco, and there are a variety of ways to enjoy this pursuit, including Yoga by the Sea offered by Sunshine Yoga Monte-Carlo, whose mission is transformation and healing through joy and movement. Visitors can enjoy International Yoga day on the terraces of the famed Monte-Carlo Casino.

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

Monaco provides wellness experiences through the menus of its Michelin-starred restaurants and many eating establishments, incorporating the region's Mediterranean diet, which has always been the backbone of Monaco's cuisine. Elsa is the world's first and only Michelin-starred restaurant that has been recognized as 100 percent organic and awarded Gold Status for five consecutive years of organic certification by Ecocert. The L'Hirondelle Restaurant at the Thermes Marins features a 500-kcal menu. Executive chef Marcel Ravin of the Michelin-starred Blue Bay restaurant at the Monte-Carlo Bay Hotel & Resort uses local produce from an on-site garden run by a local urban farming company.

#### **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

The Monaco Princess Grace Check-up Unit is a five-star medical facility where patients from all over the world can check-in for a physical, a second opinion or a variety of tests and procedures. The doctors work closely with the University of Pennsylvania and offer the same standards of medical care.

## **SPA INDUSTRY**

The Principality of Monaco has many spas that can best be described by different focuses and diverse treatments, including the Thermes Marins Monte-Carlo, Spa Metropole by Givenchy, the Fairmont Spa Monte Carlo, Cinq Mondes Spa and the Monte-Carlo Beach Spa.

## **THERMAL/MINERAL SPRINGS**

During the turn of the last century, the elite and aristocracy traveled to Monaco's thermal center to escape the wintry cold of Northern Europe and enjoy Monaco's curative climate. The iconic Thermes Marins Monte-Carlo, inaugurated in 1908, continues to be a temple of wellness with over 71,000 square feet of space and offers many services using marine-based products.

## **WELLNESS TOURISM**

The Principality of Monaco has been a true pioneer in the world of wellness and remains an innovator and leader on luxury spa offerings long before they became a trend. Staying healthy and active is one of Monaco's draws. One can walk the entire Principality, jog along the harbor, hike the Via Alpina, stroll the colorful Princess Grace Rose Garden, and benefit from the clean air of a destination aiming to be carbon neutral by 2050.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Our environment is key to our wellness. Monaco has introduced a campaign "Green is the New Glam" with the goal of becoming a destination that is as environmentally conscious as it is glamorous. As an urban resort, we are creating more urban vegetable gardens, introducing seafood that is not overfished, and creating events that don't jeopardize our air quality, such as an electric car race.

### **4. What do you see as the greatest strength of the wellness market in this country?**

Amongst Monaco's strengths is a commitment to the environment, which is central to our health. Monaco strives to protect our ocean and seas. All public vehicles in Monaco are hybrid, biofuel or electric.

### **5. What do you see as the greatest weakness of the wellness market in this country?**

Monaco is an urban resort with a very dense population.

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

Our biggest opportunity lies in the creation of holistic experiences encompassing healthy restaurants and active lifestyle activities against the backdrop of this luxurious and fairy-tale destination.

### **7. What do you see as the biggest threat to the wellness market in this country?**

Potentially, overcrowding could be a threat.

### **8. Which sector of the wellness economy are you most involved with?**

Wellness Tourism



**SUBMITTED BY:**

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## EUROPE

# SWEDEN

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### **1. What has been making news in this country in terms of the business of wellness?**

It is a fairly mature business in Sweden. It is continuing its steady growth, and people are investing more and more money into wellness experiences. We see an increase in pure health retreats, where people go into nature, meditate, yoga and eat healthily. There are also several hotels being built with a larger wellness focus in the next five years.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

The beauty market is on steady growth, and there has been a sharp increase in the cities with Botox, fillers, etc. than in past years.

#### **COMPLEMENTARY & ALTERNATIVE MEDICINE**

CAM is not integrated into Swedes lives due to it being charged while medical is free of charge. Hence, CAM is only used by those who either cannot be helped through the medical industry or those that have enough disposable income. The medical industry still has a very tight grip in Sweden.

#### **FITNESS & MIND-BODY**

Sweden is a very active country with over 50 percent of the population being active in one form or the other. It is a part of life, and one of the main reasons why Swedes, in general, stay healthy. We are also great advocates for movement in nature, and we spend a lot of time in nature.

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

In regards to weight loss, Swedes are becoming more aware, yet the government health organization is not very supportive compared with our neighboring countries. It is very much up to the individual, and it is also dependent on the disposable income. Knowledge and awareness are increasing rapidly though.

#### **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

Our public health is free of charge, and thus, we are not strong in preventative and personalized medicine. Our lifestyles, in general, are healthy and by default preventative.

## **SPA INDUSTRY**

The spa industry is big in Sweden, and most hotels have spas and spa breaks. The weekend spa break getaway market is huge. We do not see spas as being for wellness, but more for breaks, girls' weekends, relaxation and fun.

## **THERMAL/MINERAL SPRINGS**

This is not a big market in Sweden due to a) very limited number of thermal springs, and b) that we are surrounded by sea water and have lakes everywhere that we bath in.

## **WELLNESS TOURISM**

Very large in Sweden, both domestic, especially in spring, fall and winter, and international, which is very big in the summer time.

## **WORKPLACE WELLNESS**

Generally, Sweden has a greater degree of workplace wellness due to leadership culture, freedom of work, the number of vacation weeks, support in medical, and movement from the companies. It has grown organically over the past years, but believe it will take off in a more strategic way moving forward.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

That people are taking more individual control of their wellness and not leaving it to when they get sick and the medical industry. There is a big shift, and it is consumer driven. Further, it is a strong, innovative drive in Sweden, with a lot of initiatives, conferences and innovation in the field of both wellness and wellbeing, and many are saying that Sweden is going to be the center of innovation going forward.

### **4. What do you see as the greatest strength of the wellness market in this country?**

The built-in healthy lifestyle that most Swedes live by, the closeness to nature, the very innovative drive and culture in Sweden in general, and the freedom of information.

### **5. What do you see as the greatest weakness of the wellness market in this country?**

The very strong hold and belief in the medical system and the strong governmental disbelief in alternative and preventative medicine. We also have a very individualistic culture, where the government looks after us rather than our families and growth of loneliness and suicides.

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

Sweden truly has a lot to offer in wellness and to market and capture this in a more strategic way to increase wellness tourism. Further, the consumer-led growth of the alternative market will slowly make its way into everyday life.

**7. What do you see as the biggest threat to the wellness market in this country?**

The government passing laws that are negative for the wellness and preventative industry. The increasing number of Swedes that are alone.

**8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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## EUROPE SWEDEN

### **1. What has been making news in this country in terms of the business of wellness?**

We can see stronger awareness of proven health benefits gained from regular sauna and/or steam baths. New softer forms of sauna attract new people for sauna baths.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **SPA INDUSTRY**

Trend to build “home spa” after visiting public clubs and resorts

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

### **4. What do you see as the greatest strength of the wellness market in this country?**

### **5. What do you see as the greatest weakness of the wellness market in this country?**

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

We need to create an understanding that sauna and steam baths are a logical part of the wellness industry.

### **7. What do you see as the biggest threat to the wellness market in this country?**

### **8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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## EUROPE

# SWITZERLAND

### **1. What has been making news in this country in terms of the business of wellness?**

The hotels and resorts started to position themselves in the field of wellness. Several hotels decided to focus on medical wellness and try to work with the insurances. Some of them even closed for reconstructions (e.g., Park Hotel Weggis, Lake Lucerne). As well, the final opening of the Bürgenstock Resort was all over in the media.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

Using local products/high-end cremes (e.g., La Prairie, Nescens)

#### **FITNESS & MIND-BODY**

Trail running, Kneipp paths and forest bathing are trends coming up in Switzerland.

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

Superfoods (bowl places), local products/farmers markets

#### **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

Insurances promote health apps and checkups

#### **THERMAL/MINERAL SPRINGS**

Still very important, renovation projects are going on in several spring places.

#### **WELLNESS TOURISM**

In general, we reached the stage of specializing. The hotels/providers realize that it is not enough just to have a spa without any other USPs in this area.

#### **WORKPLACE WELLNESS**

Company gyms/reductions on gym fees

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

The hotels and spa providers are starting to specialize. Next to the trend of medical wellness, where hotels specialize in this field, trail running, forest bathing and treatments with local products are becoming more and more popular.

**4. What do you see as the greatest strength of the wellness market in this country?**

- > Knowledge in the medical field
- > Reputation of quality and trust
- > Pure nature: quality of water and air

**5. What do you see as the greatest weakness of the wellness market in this country?**

- > Upcoming investments: difficult funding
- > No trendsetter
- > Always a bit behind
- > Size of country

**6. What do you see as the biggest opportunity in the wellness market in this country?**

- > Global desideratum for pure nature (water, air)

**7. What do you see as the biggest threat to the wellness market in this country?**

- > Prices: strong currency

**8. Which sector of the wellness economy are you most involved with?**

Wellness Tourism

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## EUROPE

# UNITED KINGDOM

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### **1. What has been making news in this country in terms of the business of wellness?**

The aging working population and rise in childhood obesity

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **FITNESS & MIND-BODY**

More companies should provide fitness and promote wellbeing within the workplace.

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

Companies should provide healthy food choices to promote health and nutrition as part of the workplace.

#### **WORKPLACE WELLNESS**

This is important as there should be more workplaces that promote wellbeing.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

There is a rise in healthy eating, especially the rise in vegetarian and vegan foods.

### **4. What do you see as the greatest strength of the wellness market in this country?**

The fitness side, for example, the rise in gyms opening around the country.

### **5. What do you see as the greatest weakness of the wellness market in this country?**

Limited initiatives on the aging working population

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

Targeting the aging working population

### **7. What do you see as the biggest threat to the wellness market in this country?**

### **8. Which sector of the wellness economy are you most involved with?**

Workplace Wellness



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## UNITED KINGDOM ENGLAND

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### **1. What has been making news in this country in terms of the business of wellness?**

Mental health and wellbeing  
Digital detoxing

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **COMPLEMENTARY & ALTERNATIVE MEDICINE**

The use of environmentally sustainable ingredients

#### **FITNESS & MIND-BODY**

Increased accessibility to fitness providers (opening hours and locations), a greater variety of training options, and an increased emphasis on mindfulness

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

Weight Loss: Back to nature and using locally produced items. Fresh food / cleaner eating.

#### **SPA INDUSTRY**

A greater variety of experiences. Ability to maximize benefit in a shorter space of time.

#### **WELLNESS LIFESTYLE REAL ESTATE**

Greater consideration being made to incorporate wellness into new developments, giving residents the ability to incorporate more easily into their daily routine.

#### **WELLNESS TOURISM**

Increasing in popularity. Big emphasis, including more family-friendly options.

#### **WORKPLACE WELLNESS**

Very high on the agenda. With so many working days lost to stress, it is so important to increase both awareness and the ability to seek support mentally and physically.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Digital detoxing, back to nature, emotional wellbeing, self-care

**4. What do you see as the greatest strength of the wellness market in this country?**

Variety

**5. What do you see as the greatest weakness of the wellness market in this country?**

Cost

**6. What do you see as the biggest opportunity in the wellness market in this country?**

Adaptability of the market and target audience

**7. What do you see as the biggest threat to the wellness market in this country?**

Cost

**8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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## EUROPE

# United Kingdom

### 1. What has been making news in this country in terms of the business of wellness?

Yoga mindfulness time-out  
Hitt community flexible training  
Outdoors adventure travel

### 2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.

#### COMPLEMENTARY & ALTERNATIVE MEDICINE

Important adoption of natural ingredients

#### FITNESS & MIND-BODY

Awareness in the gig economy of transient lifestyles

#### HEALTHY EATING, NUTRITION & WEIGHT LOSS

Measured use of technology to establish better lifestyles and wellbeing habits

#### SPA INDUSTRY

Intelligent application of new shorter services with extended value post treatment, such as dress coping techniques

#### WELLNESS LIFESTYLE REAL ESTATE

Privacy and time are valuable commodities

#### WELLNESS TOURISM

Growing happily

#### WORKPLACE WELLNESS

Growing too slowly and stick too tick box

### 3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?

Gig working flexibility with the adoption of technology to support measurable outcomes.

### 4. What do you see as the greatest strength of the wellness market in this country?

Broad spectrum

**5. What do you see as the greatest weakness of the wellness market in this country?**

Limited educational support and investment for this vital health habit

**6. What do you see as the biggest opportunity in the wellness market in this country?**

Product sales for leisure wellness

**7. What do you see as the biggest threat to the wellness market in this country?**

The challenge of current instability in our economic future

**8. Which sector of the wellness economy are you most involved with?**

Wellness Tourism

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## EUROPE

# UNITED KINGDOM

### **1. What has been making news in this country in terms of the business of wellness?**

We launched the website [clinicalfloatation.com](http://clinicalfloatation.com) with most of the peer-reviewed publications on the clinical use of floating. This will be big in coming years when you learn that floating can treat chronic pain, PTSD and anxiety.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

Floating will become mainstream.

#### **SPA INDUSTRY**

Floating is making an entrance.

#### **WELLNESS LIFESTYLE REAL ESTATE**

New build is looking at a central floating facility.

#### **WORKPLACE WELLNESS**

There are only hints so far that floating will become news.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Evidence-based treatments

### **4. What do you see as the greatest strength of the wellness market in this country?**

Technical support for wellness

### **5. What do you see as the greatest weakness of the wellness market in this country?**

Slow growth

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

Evidence-based wellness

### **7. What do you see as the biggest threat to the wellness market in this country?**

Not necessarily Brexit! But it's a big distraction.

**8. Which sector of the wellness economy are you most involved with?**

Clinical and wellness floatation

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## NORTH AMERICA

# CANADA

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### **1. What has been making news in this country in terms of the business of wellness?**

General wellness tips, mindfulness training, workplace wellness champion, "financial" wellness

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **COMPLEMENTARY & ALTERNATIVE MEDICINE**

Upcoming legalization of cannabis

#### **FITNESS & MIND-BODY**

Company-subsidized personal wellness coaching

#### **WORKPLACE WELLNESS**

Employee Assistance Programs with wellness topics

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Education around cannabis usage

### **4. What do you see as the greatest strength of the wellness market in this country?**

Socialized healthcare, including naturopathic doctors as a treatment option

### **5. What do you see as the greatest weakness of the wellness market in this country?**

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

Worldwide exposure as a wellness leader

### **7. What do you see as the biggest threat to the wellness market in this country?**

Opioid epidemic

### **8. Which sector of the wellness economy are you most involved with?**

Beauty & Anti-Aging



**SUBMITTED BY:**

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## NORTH AMERICA

# Mexico

### 1. What has been making news in this country in terms of the business of wellness?

The public sector is very much involved in wellness in the country. For the first time, wellness is being implemented in the public schools and in the lower income population.

### 2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.

#### BEAUTY & ANTI-AGING

Ancient culture rituals

#### COMPLEMENTARY & ALTERNATIVE MEDICINE

Stem cells are being discovered and used in humans.

#### FITNESS & MIND-BODY

The culture of mind, body and soul is being implemented.

#### HEALTHY EATING, NUTRITION & WEIGHT LOSS

Mexico has 120 million people, and 50 percent of the population is under 25 years old. The younger generation is very concerned with nutrition, weight management and wellness.

#### PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH

Public health initiatives include preventive and wellness health.

#### SPA INDUSTRY

Mexico has a huge culture of native, ancient spa rituals, and it is very serious about the spa culture in our culture of tourism.

#### WELLNESS TOURISM

It is a huge opportunity for the country. It is starting to be a big issue for the country.

#### WORKPLACE WELLNESS

I find that the employers do not understand the importance of preventive medicine and wellness, and the insurance companies don't want to pay for this yet.

### 3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?

**4. What do you see as the greatest strength of the wellness market in this country?**

Our traditions, our culture, and our extraordinary service-oriented tourism.

**5. What do you see as the greatest weakness of the wellness market in this country?**

The bad media that some countries give us.

**6. What do you see as the biggest opportunity in the wellness market in this country?**

The need to grow medical tourism and wellness retreats

**7. What do you see as the biggest threat to the wellness market in this country?**

Lack of data

**8. Which sector of the wellness economy are you most involved with?**

Wellness Lifestyle Real Estate

**SUBMITTED BY:**

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## NORTH AMERICA

# MEXICO

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### **1. What has been making news in this country in terms of the business of wellness?**

The retreat market continues to grow at a rapid pace and forward-thinking resorts are getting in on the game by creating “wellness weeks” or wellness experiences for their guests during their stay.

The region of Riviera Maya and Cancun have been affected by the unprecedented amount of sargassum (seaweed) washing up on the beaches. This is also affecting many Caribbean destinations. Trips have been canceled, and visits have been affected, but plans have been put into place by the government to tackle (at least in the short term) the influx of sargassum and prevent it from reaching the shore in certain areas.

With this challenge, it is even more important for resorts to focus on non-beach activities and promote wellness, spa and excursions to prevent complaints of “beach vacations ruined.”

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

As more international brands enter the Mexican market, bringing training and education, skill levels and knowledge increase around the industry.

#### **COMPLEMENTARY & ALTERNATIVE MEDICINE**

Including complementary and alternative medicine in spa and wellness offerings at resorts and retreats is becoming more and more common and allows differentiation in a marketplace full of many, very similar, resort spas.

#### **SPA INDUSTRY**

Continued education is always in demand; however, the general level of skill in therapy techniques has certainly improved in recent years.

#### **WELLNESS LIFESTYLE REAL ESTATE**

More projects are coming onto the horizon for wellness-focused real estate and extended seasonal living locations for the North American wellness traveler to spend winters in Mexico.

#### **WELLNESS TOURISM**

This is an important sector for Mexico and aligning the offering for this market sector is essential for continued success.

**3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

**4. What do you see as the greatest strength of the wellness market in this country?**

Climate and the variety of activities one can offer in this very diverse country.

**5. What do you see as the greatest weakness of the wellness market in this country?**

Threats or perceived threats to safety as a result of cartel-related violence around the country.

**6. What do you see as the biggest opportunity in the wellness market in this country?**

Wellness lifestyle real estate is in its infancy and has huge potential here due to the proximity to North American clientele and lower costs of construction and hospitality operations.

**7. What do you see as the biggest threat to the wellness market in this country?**

The sargassum seaweed is a threat to the entire region of the Yucatan Peninsula and many countries in the Caribbean. This is generally attributed to fertilizer and pesticide run-off from various countries and rising ocean temperatures proliferating growth.

**8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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## NORTH AMERICA

# UNITED STATES

### 1. What has been making news in this country in terms of the business of wellness?

Skincare with ingredients that are healthy for the body and not chemicals

### 2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.

#### BEAUTY & ANTI-AGING

Natural products and healthy lifestyle

#### COMPLEMENTARY & ALTERNATIVE MEDICINE

Naturopathic

#### FITNESS & MIND-BODY

Complete fitness programs that include full body lifestyle changes

#### HEALTHY EATING, NUTRITION & WEIGHT LOSS

Juicing, choice of more greens in diets, such as kale and spinach, align with eating right help with overall better fitness

#### PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH

People working out creates a better society, and that is happening now in the US.

#### SPA INDUSTRY

Improved wellness, but still a confusing subject for spa's.

#### THERMAL/MINERAL SPRINGS

We don't have many in the US.

#### WORKPLACE WELLNESS

Yes.

### 3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?

More yoga than ever! More juice bars and more confusion on healthy skincare.

### 4. What do you see as the greatest strength of the wellness market in this country?

Being aware of the need

**5. What do you see as the greatest weakness of the wellness market in this country?**

Saying wellness but not living up to wellness. A lot of people say it but don't put it into action.

**6. What do you see as the biggest opportunity in the wellness market in this country?**

They have just touched the surface.

**7. What do you see as the biggest threat to the wellness market in this country?**

Not doing the right thing and putting in smoke and mirror wellness...using the words, but the letdown is no results or spending money on services and leaving without feeling the experience because it is not a personal experience, just a spa charging a lot!

**8. Which sector of the wellness economy are you most involved with?**

Other (please specify):

Skincare brands

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## NORTH AMERICA

# UNITED STATES

### **1. What has been making news in this country in terms of the business of wellness?**

A magnitude of companies are utilizing and overusing the word "wellness" to help sell their products and services. Consumers are on the bandwagon, yet they are not quite sure what the "wellness" product or service offers that the "non-wellness" variety didn't offer prior.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

Healthy aging is making a debut, and it's no longer just about beauty!

#### **FITNESS & MIND-BODY**

Consumers are interested in fitness for more than just looking great in a swimsuit. People want to feel good, and that, in turn, makes anyone look great if they truly feel great!

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

Reading labels, sourcing one's own food, and paying attention to mass-produced foods disguised as "healthy" are more of the norm now.

#### **SPA INDUSTRY**

Spas continue to be an important part of the real estate asset, as long as they are designed correctly with the right components for the right market.

#### **THERMAL/MINERAL SPRINGS**

Americans are hot on hot springs!

#### **WELLNESS LIFESTYLE REAL ESTATE**

Wellness real estate is still for the wealthy. Hopefully, this will change as we, as a society, learn how much a healthy lifestyle can be preventative medicine.

#### **WELLNESS TOURISM**

What is wellness tourism? Is it a tourist who seek wellness specifically, or simply a tourist seeking an adventure or change of pace, who then, ultimately, feels well and has a wellness experience? I believe it's both!

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**



**4. What do you see as the greatest strength of the wellness market in this country?**

The hospitality industry has the opportunity to bring wellness to many more guests than those that visit the spa. So much of a visit to a hotel can feel well, with fresh foods, nature's fitness gym, and new experiences. There can be an ROI on wellness, as long as the wellbeing hospitality experience is planned well.

**5. What do you see as the greatest weakness of the wellness market in this country?**

Overuse of the word "wellness" just for the marketing buzz.

**6. What do you see as the biggest opportunity in the wellness market in this country?**

For real estate developers, asset managers, and hotel operators to plan for wellness appropriately—at the right cost, with the right attributes, and for the right market.

**7. What do you see as the biggest threat to the wellness market in this country?**

**8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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## NORTH AMERICA

# UNITED STATES

### 1. What has been making news in this country in terms of the business of wellness?

In the US, we are seeing that rather than being considered a luxury indulgence, the idea of wellness has grown to become a widely accepted practice. With the demand for wellness on the rise, we see businesses thriving by meeting consumer needs on both an accessible and luxury access point.

### 2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.

#### BEAUTY & ANTI-AGING

Dubbed by Allure as the “marijuanaissance,” CBD is having its moment in beauty. The enthusiasm building around the emerging science (with legitimized medicinal claims) has brands and media looking forward to the future of this industry.

#### COMPLEMENTARY & ALTERNATIVE MEDICINE

We have seen a lot of the wellness retreats opening with an emphasis on strong Eastern roots (e.g., YO1, Menla, The Art of Living and Chopra Center). Practitioners from India, who are experts in these ancient medical practices, address the root cause of each guest’s health issues during an immersive, regimented stay. These wellness retreats offer a truly authentic, comprehensive and completely customized experience for guests and, while traditional destinations in India would recommend guest stays of 2–3 weeks, these facilities are tailoring these concepts for Westerners and creating 3-, 5- and 10-day packages and offering satellite facilities so guests can continue their journey/holistic health mission at home (YO1’s phase two plan will include these satellite offices in NYC, LA, etc.).

#### FITNESS & MIND-BODY

In the US, we are seeing an evolution of the “social wellness club”—the newest twist on a private club that provides its members 360-degree wellness support:

- The Well, opening in NYC in 2019, brings together the benefits of Western medicine and the wisdom of Eastern healing in a science-backed ecosystem for wellness. By gathering expert doctors and skilled practitioners under one roof, The Well builds customized plans uniquely suited to each of their members and their goals.
- Rise by We, a health club and “super-spa” concept from WeWork, using social fitness to elevate mind, body and spirit
- Wellvyl, a wellness movement and social club focused on health, inclusiveness, positive thinking and having fun
- The Assemblage, which pairs co-working spaces with mindfulness exercises and Ayurvedic food

## **SPA INDUSTRY**

Personalization is everything. No longer are we in the days of a deep tissue massage or vitamin C facial. Guests want their treatments to be personalized to their specific needs, which is why the Ayurvedic system of healing has become increasingly popular. Although Ayurveda has been around for thousands of years, Americans are particularly taking to the customized approach to wellness as a way to target their ailments in a more holistic way.

## **WELLNESS TOURISM**

The desire to reconnect with nature through adventure travel, wellness retreats, spa experiences and fitness will grow even stronger as new evidence piles up about the benefits of being outdoors:

- **Adventure Travel:** Groups, such as Nomadic Expeditions (Mongolia, Siberia, India, Nepal, Tibet, Bhutan), give guests the opportunity to immerse themselves in once-in-a-lifetime outdoor activities, such as adventure trekking in the Altai Mountains, camel rides, off-roading, etc. The Bushcamp Company is a small collection of camps in Zambia's South Luangwa National Park. As the only safari operator in this southern section of the park, they have six small, intimate bush camps (accommodating six to eight guests at most) and one lodge with 18 thatched chalets. Wi-Fi is only available in certain sections of the Mfuwe Lodge while each bush camp is totally off-the-grid, with no access to the internet, allowing guests to fully disconnect and enjoy this once-in-a-lifetime adventure.
- **Wellness Retreats:** "Adult camps," such as Well + Good's wellness retreats, are becoming increasingly popular, offering guests outdoor activities, such as hiking, canoeing, fireside chats and movie nights under the stars.
- **Spa:** MetWest properties, Gaige House + Ryokan and Montage Palmetto Bluff offer forest bathing, which allows for guests to explore nature.
- **Fitness:** Equinox offers outdoor group workouts, including boot camps, yoga, Pilates, running and hiking.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

The need to de-stigmatize mental health issues has been a big topic in the US in 2018—from the tragic losses of Kate Spade to Anthony Bourdain to DJ Avicii, amongst many celebrities that have come forth with their mental health struggles, including Demi Lovato, Mariah Carey, Kendal Jenner, Olivia Munn, Camila Cabello. With that, there have been major campaigns designed to encourage the 1 in 5 people struggling with mental health disorders to engage in a wellness program designed to treat their personal needs.

### **4. What do you see as the greatest strength of the wellness market in this country?**

The boom in the US economy along with shifting demographics has created strong growth for the wellness market. Millennials are finally doing better economically while aging baby boomers create a demand for specialized care. This, coupled with the current healthy economy, is the US's greatest strength in the wellness market.

**5. What do you see as the greatest weakness of the wellness market in this country?**

Education. Teaching our children about the importance of wellness, mental health, fitness and nutrition is the greatest weakness we have in the wellness market in the US. While children suffering from socio-economic disparities are highly unlikely to have access to the same wellness programs as children from more affluent families, we have seen a positive reaction to those trying to change the system. The widely publicized opening of LeBron James's "I Promise" school in Akron, Ohio shows the positive impact wellness can make on a community. The school offers an integrative approach to education where teachers are charged with developing well-rounded students by facilitating "Be Best" meetings that teach students holistic activities, such as gardening and yoga. Kids are given free healthy breakfast and lunch, a bike and, if they graduate, are offered free tuition to attend the University of Akron. Giving underprivileged kids the chance to focus on their own wellbeing is a great first step, but there is more ground to cover if we want to raise more mindful, well-rounded children.

**6. What do you see as the biggest opportunity in the wellness market in this country?**

According to Forbes, legal cannabis revenue in the US market is projected to hit \$23.4 billion by 2022 (73 percent of the market). Adapting to these policy changes and meeting consumer demand while also educating outliers on the benefits of cannabis could prove to be the greatest opportunity in the US.

**7. What do you see as the biggest threat to the wellness market in this country?**

Economic factors certainly play a part in making wellness accessible to all.

**8. Which sector of the wellness economy are you most involved with?**

Wellness Tourism

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## NORTH AMERICA

# UNITED STATES

### **1. What has been making news in this country in terms of the business of wellness?**

Mental wellness has been the top news on the island after the passing of Hurricane Maria in September 2017.

### **2. Please provide 1-2 sentences that describe what you think is an important development in this country for each of the following wellness sectors.**

#### **BEAUTY & ANTI-AGING**

Puerto Ricans are always looking for the latest advancements in the beauty and anti-aging sectors. The industry is keeping up with all the worldly trends.

#### **COMPLEMENTARY & ALTERNATIVE MEDICINE**

Multiple clinics are being developed to fulfill this need locally.

#### **FITNESS & MIND-BODY**

There are all kinds of gym structures and businesses to fit all needs, from the trendy bootcamps to the sophisticated gym memberships. However, the mass is being well catered to by gym memberships offered by companies such as Planet Fitness that, with a low monthly investment, still provide amazing fitness equipment.

#### **HEALTHY EATING, NUTRITION & WEIGHT LOSS**

There has been a shift into a more conscious dietary trend. Puerto Rico is an island that promotes a rice and beans culture, so we don't have as many vegan options. However, there is a new mind-set and a couple of options arising.

#### **PREVENTIVE & PERSONALIZED MEDICINE AND PUBLIC HEALTH**

Public health is far from acceptable. It is up to each other and your medical insurance to provide for yourself and your family.

#### **SPA INDUSTRY**

The spa industry in Puerto Rico has in the past been segregated to mostly hotel spas and local boutique spas. We play a big role with Cloud Spa as a local urban spa that caters to both the local and tourism sectors.

#### **WELLNESS TOURISM**

We need to promote wellness tourism more, as Puerto Rico has enchanted beauty and amazing resources.

## **WORKPLACE WELLNESS**

Many big companies on the island, mostly in the pharmaceutical industry, have amazing programs. But there is not anything for the common workforce or the majority of the island.

### **3. What are the most important, eye-opening or emerging trends in wellness happening now in this country?**

Body craze is now in effect in Puerto Rico. Both the female and male demographic is constantly looking to have better bodies—looking for natural alternatives and also considering plastic surgery.

### **4. What do you see as the greatest strength of the wellness market in this country?**

Our fitness professionals and the medical experts are very well educated and knowledgeable in their fields. They mostly educate abroad and come back with the goal of servicing their island.

### **5. What do you see as the greatest weakness of the wellness market in this country?**

Other countries show more advanced technology and social media skills.

### **6. What do you see as the biggest opportunity in the wellness market in this country?**

More collaborations with the medical field (plastic surgeon) of other countries in order to improve the results and the patients' wellbeing.

### **7. What do you see as the biggest threat to the wellness market in this country?**

Other countries have cheaper labor laws that allow for better pricing.

### **8. Which sector of the wellness economy are you most involved with?**

Spa Industry

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