



GLOBAL WELLNESS
SUMMIT **MEXICO**
CITY 2015

GLOBAL WELLNESS SUMMIT
**INDUSTRY BRIEFING
PAPERS 2015**



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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 2015. Please note that these papers are submitted by the authors and have not been edited.

AFRICA: MAURITIUS

1. What is currently making news in your country when it comes to wellness or wellbeing?

Mauritius is both a tourist destination as well as having a local population of approx. 1.5 million. Global travelers are arriving with a greater awareness of spa & wellness as a concept and experience. Capture Rates within hotel spas have increased due to this increase in awareness and a greater need for guests to experience spa for the first time. Local inhabitants of Mauritius are also increasingly becoming aware of wellness due to public programs focused on the diseases of civilization - cardiovascular disease, diabetes and cancer. The public are beginning a journey in self-knowledge on how lifestyle, exercise, nutrition and stress impact on their health, this in turn is providing a positive impact on their exploration of spa for stress relief and self-nurturing.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: More spas have been updated during 2015 in regard to their concept, menu and treatment offerings

Wellness Tourism: This is still in its infancy with focus mostly on vacations including spa treatments or minor aesthetic procedures such as hair grafting, Botox, liposuction, etc.

Wellness Living Communities/Real Estate: A few upmarket developments are presenting themselves as a real estate destination designed for a healthy lifestyle environment featuring parks, fitness and in some cases spa facilities

Beauty: Pure beauty salons are in decline with more emphasis given to day spas

Fitness: On the increase with more fitness and gyms opening to cater for the public awareness of the benefits that exercise has on wellbeing and diseases of civilization

Nutrition: On the increase with more campaigns on radio and press to educate the public regarding basic healthy nutrition, however the information is not up to date scientifically and promotes the low fat low calorie concept typical of dieticians.

3. How would you describe the state of workplace wellness in your country?

This is still in the very early stages with some awareness from human resources advocating health & safety measures, other elements such as work-spaces, ergonomics, nutrition, fitness are still far from being addressed.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Hospitality sector and real estate sector have improved their attitude to investing in spa/wellness facilities as a key component of the total package.

Spa facilities have been refurbished in a number of hotels; new fitness centers have been opened providing a range of health services.

5. Whose responsibility is it to create a well world?

The first step is to create the awareness that we are all connected & inter-connected - therefore it is both our personal responsibility to create a well world and assist those around us to create a well world. The impact of improving our own individual wellness in tandem with our environment brings forward the realization that all elements of life operate best when they are inter-dependent.

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AFRICA: NAMIBIA

1. What is currently making news in your country when it comes to wellness or wellbeing?

The wellness revolution has arrived in Africa. In my country, Namibia in particular, we are experiencing a conciseness rooted in the Ancient philosophies and therapies. People are seeking that that is linked to the 'source' and not so much 'western' methods as it were.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Authentic African spa's, whose focus is on the ancient methodologies of our Ancestors.

Wellness Tourism: It is still in its infancy.

Wellness Living Communities/Real Estate: Untapped market.

Beauty/Fitness: the consumer is guiding this segment, with demands of Natural treatments, products and for the fitness alternate fitness regimes. (Outdoors activities).

3. How would you describe the state of workplace wellness in your country?

Because of the awareness and the effects stress and our environment plays in our daily lives, there is a consensus from both corporate and employees to better workplace environments. There is scope for growth, but it is a long way off compared to where the rest of the world is.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

With the increase in Tourism, all the role players are aware of the wellness industry and how it can impact the business positively; there is a positive increase in spa's; wellness practitioners and fitness activities.

5. Whose responsibility is it to create a well world?

It is EVERYONE! We can all make a difference in our own way. I personal have taken it upon myself and through my business to take to the globe, African wellness. Through our ancient therapies and products. We can all do something to make this world a WELL-WORLD.

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ASIA: BALI

1. What is currently making news in your country when it comes to wellness or wellbeing?

More and more wellness programs such as intensive detox and cleansing retreat programs are offered in many hotels and stand-alone wellness facilities as well as health and nutrition awareness and campaign and a much increasing supporting yoga festivals almost throughout the countries, especially in Bali and Jakarta.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

The stakeholders; government, communities seems to be creating opportunities and at the same time providing the supports in need to enhance the development to various and much better level.

3. How would you describe the state of workplace wellness in your country?

Our country has a complete set of talented skillful people who were raised in servicing culture. We have richest culture that able to support the wellness but need the advance employment system support hand in hand by the professionals and government. This system is to give the space and recognize the local skills and knowledge to be able to compete with the other professional from other country.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

For spa destination and wellness tourism, both in quality and quantity. Not only in Bali but also spread out to more and more regions in Indonesia which offer different cultures that influence the spa treatments as well as the wellness programs.

For example:

Nihiwatu resort in Sumba island, which can be reached by 50 minutes flight from Bali. The unique 'Nihi Oka Spa Safari' offers couples a full day experience journeying across Sumba's dramatic west coast to nearby Nihi Oka valley. Guests have the

option to join a one-hour group morning yoga session before a bush-cooked breakfast in the rustic Nihi Oka treehouse platform. Any number of pre-selected treatments can be enjoyed amidst uninterrupted views of the sea and cascading rice paddy fields. Treatments include full body massage, cooling and rejuvenating wraps, body scrubs and foot reflexology – all using natural, local ingredients.

5. Whose responsibility is it to create a well world?

Everybody who cares about today, tomorrow and the next generation of our children.

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ASIA: CHINA

1. What is currently making news in your country when it comes to wellness or wellbeing?

The Health and Wellness industry has been growing rapidly in developed countries whilst in China the health industry is still in its early development stage. Recently the government has put “Health and Wellness” as a national strategy and is predicting a US\$1.6 trillion market value in wellness, health and medical industries.

In the high-end customer group (those who own more than US\$1 million in assets) 88% are willing to invest in health, and health ranks first amongst needs of education and social responsibility. (Hurn Research Institute Survey)

With an increase in health management awareness, people are choosing to relax in spa centres, join fitness clubs, use health devices or APPs, check their body regularly and purchase different types of health care products to better manage and improve their health. According to the Boston Consulting Group estimates, ‘Due to insufficient knowledge in health products and no trust in product promotion, brand and reputation of products and services becomes important and the first thing the consumer considers. However, as a traditional health service, TCM is welcomed by people of different ages to improve their body health.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Hotel Spa: Many five star hotels are tending to re-position or upgrade their spa centres. Offering a relaxing place only no longer satisfies the guests who are looking for more integrated and holistic health services from their hotel spa experience. This encourages hotel spas to create and provide wellness services that address guests’ body, mind and soul balance.

Beauty Spa: Beauty spas have seen huge development in the China market, and now show increasing segmentation with specialist beauty spa’s such as weight loss, freckle removal, breast beauty etc. These are able to quickly attract guests, but overlook guests’ holistic wellness improvement due to their limited services. However, several spas, with central locations and high-tech products and services, targeting mid-high end business people, have very clear brand positioning, and provide integrated wellness services and multifunctional packages, which enable guests to have brand new wellness experiences.

Destination Spa: Very few destination spas have been developed in the China market, the closest are hot spring hotels that have started to offer wellness

packages. Interest in establishing Destination Spa's is however growing rapidly and several are expected to open in the next few years. Qin Wellness a 25000 sqm, 80 room property, in Haikou, will open in 2017 as possibly the first full service destination spa in China.

Wellness Tourism: Wellness tourism is perhaps the fastest growing market. 80% of Chinese see travelling as a way of stress relief. According to Ernst & Young, the Chinese tourism industry will outpace that of the U.S., and wellness tourism will be growing as overseas travel grows. The factors that drive Chinese wellness tourism are government support, growth of income, deteriorating health conditions, and increase in health management awareness.

Wellness Living Communities/Real Estate: Very little development to date. Many properties are themed as 'wellness living communities/real estate' however they offer little beyond natural resources – such as sunshine, beach, or meeting the Chinese green building standard. The market is increasingly aware of the importance of wellness living and more wellness living communities are expected. For instance, many of the top real estate developers are considering large scale developments with wellness as a core value.

Beauty: The market value of the beauty industry is 3 Trillion RMB (US\$0.5 Trillion) per year with steady growth of 15% every year, which is moving even faster than the increase in GDP. According to the China Beauty Economy Annual Report beauty ranked fifth in value following consumption in real estate, vehicle, e-communication and tourism.

Fitness: A report by IBIS World estimates the current value of the gym, health and fitness industry at US\$5.14 Billion. In 2004 IBIS estimated there were 1413 fitness centres, generating US\$582 million and this grew to 5749 fitness centre and US\$3.69 billion in 2012. Fitness is now very popular in China and services have continued to improve. A few top fitness trainers with U.S. ACE certificate are working in fitness centres in Beijing and Shanghai, charging more than US\$300/hour.

Nutrition: Older Chinese have long understood the value of nutrition, when to eat what and why, however the knowledge that formerly passed from one generation to the next has started to be lost as the newer generations suffer consequences of urbanisation (convenience foods, limited time). This has opened opportunities in the nutritional supplements market which offers assistance with everything from reducing blood fat, anti-fatigue, beauty, weight loss, reducing blood glucose, enhancing sleep and vitamin supplement. Enhancing immunity, reducing blood fat, anti-fatigue and vitamin supplements contribute 50% of overall nutritional products.

3. How would you describe the state of workplace wellness in your country?

Work place wellness has historically been limited. In 2012 Regus surveyed Chinese employees and 73% reported their jobs were a source of stress indicating that corporations aren't addressing work place wellness successfully. Many companies do have weekly fitness activities for their employees to join and the recent national strategy to focus on health and wellness will start to have a positive effect on work place wellness.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Mr Zhao, president of the Changian Group recently said 'the first half of my life I devoted myself to the real estate industry. The second half I will dedicate it to bringing a brand new health and wellness lifestyle to the China market. These comments represent a great number of investors who want to enter into the health and wellness industry.

In a country whose real estate market is suffering because of poor positioning and product Health and Wellness is seen as a beacon of light. Octave Living by IMC is an example of a huge property development based around wellness.

5. Whose responsibility is it to create a well world?

Establishing a well world is everyone's responsibility. From government and related departments, including wellness supporting policies to master planning, architect design, interior design, furnishing, operation, all parties should be responsible for creating a well world.

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ASIA: INDIA

A famous statesman had said about the transformative power of INDUSTRY GROWTH development, “We cannot always build the future for our industry, but we can build our industry for the future,” as it aptly sums up what we are trying to do through the Beauty & Wellness Sector Skill Council.

1. What is currently making news in your country when it comes to wellness or wellbeing?

The Wellness Industry in India has been growing exponentially over the last couple of years in the field of beauty and wellness sector. Many new thought process of spa has been opening. For example Kids SPA, Salt Escape SPA which claiming that it is a First Salt Spa To Help you to Breathe Better! Resorts spa has been increasing, the numerous day SPA and SPALON (Spa and Salon) concept of spa has been opening every other day In India.

In last few years there was manpower issue in the wellness industry, which was the biggest hurdle, but the initiative taken by new government of India has now will help to resolve the manpower issue.

The National Skills Development Council has been established with the mission of Skilling 500 million people by 2022 in wellness industry. Government has understood the significance of Skills and knowledge are the driving forces of economic growth and social development for our country.

The wellness industry in India is poised to touch Rs. 1,00,000 crore (Rs 1 trillion) by 2015, with a compounded annual growth rate of 15-17%, from about Rs 70,000 crore in 2012 , with a likely shortage of ~600,000 skilled personnel by 2016. FICCI-PwC report had forecast that the number of people employed in the Wellness space could potentially almost treble from over 1 million lakh in 2011 to 3 million by 2015

The major challenges faced by the Indian Wellness domain on the wellness skill development front are in terms of the inadequate availability of training infrastructure, standardized training curriculum (especially at the entry level), the absence of quality trainers in sufficient numbers, easier financial access to outcome-linked skills training initiatives, as also a general misplaced notion about the benefits of vocational training. Matters have not been helped by the fact that the Wellness domain in India is still largely unorganized and fragmented, with a very limited number of companies in the organized space having a pan-India presence.

The talent deficit poses extreme threat to the growth and expansion of the whole beauty and wellness industry. The sector needs to come together on one platform at

the national level so that a cohesive thread between those who need a livelihood, those who will prepare and employ them are in Wellness Industry.

There are enough success stories in the country to share and enough space to expand. Keeping all this challenges and problems with the above reality Beauty & Wellness Sector Skill Council (BWSSC) was formed. The aim of the sector skill council is to focus on establishing an effective and efficient eco-system for development and imparting of skills for Beauty and Wellness industry including relevant curriculum courses, information database, delivery system, standardization, and accreditation and certification process to enhance the employability of the Indian workforce globally.

By 2023, the SSC aims to accredit 390 Training organizations, train 2,200 trainers and provide certification to an almost 1.67 Million (16.7 Lac) workforce by 2023.2023 Indian wellness industry will be working with skilled manpower to flourish individuals business in the Spa, Beauty and Fitness industry.

In collaboration with the Union Ministry for Human Resource Development, the Beauty& Wellness Sector Skill Council (BWSSC) formed by CII with financial support from the National Skill Development Corporation. Being the training partner with BWSSC and NSDC, my institute in rural areas has recorded registration of more than 1000 students and number is even rising day by day, this highlights that the wellness sector is expanding vastly not only in the urban areas but in rural areas too.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: As the impact of western culture is rising the spending power of Indian households has increased in the past few years they are comfortable with spending surplus money on beauty and wellness services. With the global and media exposure for many youngsters' today, looking good is equivalent to feeling good that's why they prefer spa therapies for the feel good factor. Teens, young and old people – all are giving more attention to their looks, and it has become prime factor in both personal and business growth.

Wellness Tourism: Wellness tourism is the trending in the country. The one opting to become wellness tourists will consider significantly lower costs, greater availability of care and a wider selection of treatments, and the recent trend to travel with a higher purpose. Wellness tourism is perfectly suited to “mindful” travel where the health-conscious among us seek natural remedies implemented to promote healing, prevent future illness, and of course deliver a certain measure of tranquility and stress relief. Providing cerebral and spiritual attunement, wellness tourism offers the best of both worlds for healing and rejuvenation, well-being and relaxation.

Wellness Living Communities/Real Estate: Most real estate developers have started incorporating luxurious spa into their projects. Often international operators are being considered for these projects as it gives the project a sense of credibility which real estate developers constantly strive for in India. For example: Six Senses Spa have been asked to develop a spa by the Jaypee group of builders for their ambitious 500 acres residential project in Delhi. Same applies to the other big builders. They want to make sure SPA is the neighborhood concept and this can give them more mileage to sale their property.

3. How would you describe the state of workplace wellness in your country?

I think any workplace health promotion activity or organizational policy is designed to support healthy behavior among employees and to improve health outcomes. It can consists of diverse activities such as on-site health education/fairs; free medical screenings; health coaching; weight loss, stress management and smoking cessation programs; wellness communiqués, on-site fitness programs and facilities; health club memberships, on-site kitchens with healthy food options, company wellness competitions; mobile and web-based education and social platforms; and financial and other incentives for participation. Workplace wellness has been expanded over the past decade to encompass the creation of a “Culture of Health” within the worksite. It includes programs offered by companies and businesses aimed at improving the health and wellness of employees, in order to reduce costs and enhance productivity and performance. As these programs raise awareness, provide education, and offer incentives that address specific health risk factors and behaviors (e.g., lack of exercise, poor eating habits, stress, obesity, smoking etc.) and encourage employees to adopt healthier lifestyles to enhance their work productivity at their workplace.

As Indian metropolitan cities are crowded, by the time employee reaches the workplace he /she is exhausted. If company will offer them wellness at workplace will give a boost to their performance.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Most industry respondents see wellness as an important future driver and as good for business. Nearly all industry respondents feel that the concept of wellness is and will continue to be very important for the spa industry as well as for the new business opportunity hunters.

Eighty-two percent have made changes in the last five years in response to the wellness trend. Ninety-five percent expect growing interest in wellness to impact their businesses over the next ten years. There are various changes that have been made by industry respondents in response to the wellness trend. The one who have

introduced new services or products in response to the wellness trend have reported a change in their marketing strategy.

The business opportunities for the spa industry along the wellness continuum will require long-term effort and investment. The spa owners and investors to make small adjustments to their service offerings and needs to reexamine their marketing approaches and customers with a new, wellness-oriented viewpoint.

The tradition of spa as a place for healing, renewal, relaxation, and feeling well positions the spa industry as one of the most logical sectors to take advantage of (and help lead) the wellness movement. The core customer base for wellness almost directly overlaps with the primary customer market for spas.

In India you see Spas & Salons blooming in every corner of the Metros and B, C-towns. I've seen this industry growing since last 23 years. Right from owning a salon in my native place to now leading a Top Spa Solution Company and a Luxury Spa (and its franchisee). The journey has been fascinating and pleasant. New challenges raised every day and to overcome them gave me and my team a wonderful feeling. Since 23 years I have been in this industry, I feel and believe that there is great potential but only if the right guidance is available for people who don't have any idea what the industry has concealed for them.

Placing spa within the context of wellness can raise awareness that massage and other spa services offer real therapeutic benefits beyond pampering. Educating consumers about how spa can enhance a person's overall health and quality of life or how it can effectively treat real ailments and conditions will help consumers to view their spa spending as an investment or an essential element in maintaining their health.

To illustrate this idea, we found, in the consumer survey conducted for this study, 71% of respondents said they would be "much more likely" or "somewhat more likely" to visit a spa if they learned that a series of research studies demonstrated that spa treatments deliver measurable health benefits.

On the other hand, focusing on wellness opportunities does not, by definition, exclude pampering and indulgence. In fact, pampering can be a healthy thing and is considered by many thinkers in the wellness movement to be an important component of wellness. Most offerings across the range of typical spas services – massages, body treatments, hydrotherapy, facials, beauty services, anti-aging services, and so on. It would be considered wellness services if provided with the intent of helping a person feel more well physically or mentally by a curative touch, addressing a specific ailment or condition, or improving a person's self-image and sense of well-being.

5. Whose responsibility is it to create a well world?

Society who can create awareness by speeding word and conducting activities for healthy life style. Yoga has been always a part of social activities which became ignorant form of routine life by passage of time in India. Few months back it created a buzz as Indian Prime Minister showed interest and declared it a” Wellness Activity” in India. Spa lovers who are into wellness industry, corporate world can create wellness at workplace for healthy employment.

Due to health sickness individuals who have been ignorant and typically rely on medical doctors for treatment to fix their problem do return to good health but, along with doctors instruction, they should look forward to adopt alternative wellness solutions to keep themselves healthy. Most advocates of wellness philosophies emphasize each individual’s responsibility to take charge of one’s own health and to engage in behaviors that will proactively prevent illness and promote a higher level of health and well-being.

Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity. There are a number of terms and concepts that are associated or equated with the wellness movement, but which are in fact distinct ideas.

Let’s turn the famous proverb other way round.

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ASIA: INDIA

1. What is currently making news in your country when it comes to wellness or wellbeing?

India is one of the youngest countries in the world with nearly 60% of its population below the age of 30. As such, wellness is not necessarily on the top of its priority list, inspite of India being home to a major Wellness Systems like Yoga, Ayurveda, Meditation, etc.

In Nov 2014, the Government of India formed the Ministry of 'AYUSH' to promote Ayurveda, Yoga, Naturopathy, Unani, Siddha and Homeopathy. As part of this initiative on "Indian Wellness" by the current government -The International Yoga Day was held in Delhi on 21st June 2015. It heralds a revival of Yoga in India among the common person. Ayurveda and Meditation too are making a strong comeback. Wellness is also part of the 25 sectors that have been identified by the current government initiative - "Make in India Campaign".

Most 5 and 4 star hotels have Spas that offer Ayurvedic therapies. The Day Spa business is also growing exponentially with Gyms, Beauty Salons, Ayurvedic Spas, and Foot Spas mushrooming everywhere. Another interesting aspect is that there is that there are a number of Organized and Franchised chain of wellness centers coming up all over India.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: With increasing disposable incomes, stressful lives led by young Indians the need to de-stress on weekends is on the rise. This has led to an increased growth in Day Spas in India. The rise in day spas range from luxury spas in seven star hotels to premium spas in malls and value spas around residential blocks. Indians are willing to experiment with different types of massages from across Asia. Beauty Salons, Fitness centers and Ayurvedic Day Spas are fast growing based on a franchise model.

Wellness Tourism: India's wellness tourism industry is poised to grow at a CAGR of 22% compared to the US growth rate of 5.8%. This is primarily due to the increased awareness and acceptance of the benefits of Yoga, Meditation and Ayurveda. India has luxury destination spas like Ananda and Vana in the Himalayas and Orange County, Kumarakom Lake Resort, Somatheeram, etc in the South. It also offers premium and value offerings to budget travellers. India is finally poised to be a major

destination for Wellness Tourism following easing of government regulations for visa such as visa on arrival, e-visa, etc.

Wellness Living Communities/Real Estate: We can trifurcate wellness into Body, Mind and Spirit. The most famous wellness international commune related to the Mind and Spirit in India is Auroville in Tamilnadu, which is not owned by anyone and free for anyone to join. India also has many Ashrams related to various Gurus, which are large communities by, themselves be it the Osho commune in Pune or the Art of living Commune in Bangalore and the Sadhguru Jaggi Vasudev's commune in Tamilnadu.

Most high end gated communities in Indian Metro cities now boost of Wellness offerings like gym, yoga halls, etc, although the concept of Wellness living communities like in the West with real estate focus and ownership is still a distant reality.

Beauty: This segment is the one that is growing the fastest based on rising awareness and higher disposable incomes. Medical aesthetics clinics are also gaining popularity. Hair transplants, weight and inch loss clinics and Beauty salons are rapidly growing. Organized and franchised based Beauty Salons and Hair Services chains have started to mushroom in the metros and tier 2 cities in India and are replacing the 'unorganized neighborhood' salons.

Fitness: Fitness centers are becoming very popular driven by role models in Bollywood and availability of gyms in almost all localities in major cities in India. Other forms of fitness like running, walking, cycling too are getting popular.

Technology savvy cities like Bangalore, Delhi, Mumbai, etc. have taken to fitness apps, although price is a major role in determining the brand.

Marathons are becoming increasingly popular in India and Indians have taken to running like never before. Fitness products like heart rate monitors, fitbit watches and nutrition supplements are seeing an increased growth in India.

Nutrition: India is the diabetic capital in the world. Sugar free foods are being aggressively marketed. Supplements and herbal products especially marketed by Patanjali (promoted by Baba Ramdev) and other herbal companies have taken the market by storm. Organic food is becoming increasingly popular with most premium groceries and online food companies offering organic products. Large companies like Fabindia and Organic India are growing very fast in their nutrition offerings for the health conscious Indians. Consulting dieticians and nutritionists is also becoming very popular in India.

3. How would you describe the state of workplace wellness in your country?

Corporate Wellness programs are currently becoming increasingly popular with major corporates sponsoring marathons and “stepathalons” in India. It’s common for HR to launch programs like “Couchto5k” to promote running and health. Most of the large corporates in metros also offer gyms within the office campuses.

In nutrition, health food is being offered in company canteens and green tea is served commonly in most companies. Companies are also willing to sponsor training programs to promote “emotional and mental wellness” amongst employees by training them in techniques like EFT, meditation and yoga etc.

Corporates in India are yet to wake up to Indian wellness in a big way and are currently busy experimenting with international methods of wellness and fitness. “Wellness Off sites” are a couple of years away in India.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Spas and beauty salons in India are fast growing through the franchise route through investments by individual businessmen. There are various examples of spas and beauty salons registered with Franchise India like Aroma Thai Spa, the four fountain spas, Sukho Thai, Naturals Beauty Salons, Richfeel trichology Centre etc. Stand-alone Spas have also mushroomed by investments by individual entrepreneurs. Last year saw an investment in Tattva Spa by the Indian Angel Network and Enrich beauty salons raised series B funding last year through private equity placement.

The VC industry and the PE industry’s current attitude is to invest in tech based platforms/ e-commerce platforms like nykaa.com - a beauty and wellness retailer which raised series B funding of 9.5 million \$ this year. On demand home salon services, home and wellness portals also raised funding this year. Some examples include – Purplle.com, Fitmein.com, Curejoy, Hijinny, The homesalon, Vanity Cube, MSM Box, Zoojoo.be, Belita, Vyomo etc. Organic food e-tailer Naturally Yours also raised seed funding this year.

A lot of action is expected in the Indian wellness space in the years to come as far investing from individuals and VC funds is concerned.

5. Whose responsibility is it to create a well world?

A well world resides within each one of us.

Hence, it is the responsibility of each one of us to find the path to this world. However, this journey need not be done alone. Joining support groups, friends,

ashrams or even taking help of a guru or a coach may help make this journey interesting and rewarding. While, the path may start with physical well-being it must transcend to mind and soul to find lasting bliss and true Wellness.

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ASIA: ISRAEL

1. What is currently making news in your country when it comes to wellness or wellbeing?

Wellness is quite a new term in Israel. Wellness in Israel does exist in a practical way. One can find gyms and spas, medical and health centers, medical tourism, outdoor activities, beauty clinics and more; yet it is very symbolic that we still don't have a common word in Hebrew for Wellness and we use the English term. However, I can say that the awareness to the wellness and wellbeing term is rising and the industry in general is developing in several sectors. For example, in a few months, the first wellness conference will be held in Tel Aviv.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: The Spa industry includes day Spas, Spa hotels, medical spas and mineral baths (such as the famous Dead Sea). Due to the increase of quality of life, so has the quality and variety in the spa industry. However, I think there is still room for development in the management and service areas. (Israel is 3rd in rank in number of spas and spa revenues in the Middle East North Africa region in 2013.)

Wellness Tourism: Medical tourism - Israel has become a center for people seeking specialized qualitative treatment. Beyond that, Israel is also becoming a wellness tourism hub with several wellness hotels in development. Israel's history, the holy sites and the dead sea, certainly help in this sense with attracting the tourists. (Israel is ranked 3rd both in the number of trips and in expenditure in the tourism market in the Middle East North Africa region in 2013.)

Wellness Living Communities/Real Estate: Certainly on the rise. This sector is still in its roots but gaining awareness and is being developed. You can already see significant marketing campaigns for wellness communities especially in the Tel Aviv metropolitan and the first real estate wellness projects.

Beauty: This market is developed. Israel offers a variety of modern, technological and sophisticated services and skilled personnel.

Fitness: There are about 1200 gyms and clubs - from local neighborhood clubs to big international sophisticated chains. The estimated number of people training in

clubs is 10% of the population and growing. According to a survey conducted by the Israeli ministry of health in 2013, about 37% of Israelis reported doing physical activity every day or almost every day. The market is quite developed and modern. I think that one of the future trends is opening low cost gyms that would attract more members in the near future. Another trend is adopting a more wellness holistic view into the existing clubs.

Nutrition: Similar to the beauty market, it is a developed market. One of the developments is certainly recognizing the importance of keeping a balanced diet from early age and the increase of awareness and practical steps in schools and public institutions all over the country. Another development is the increase of vegan and vegetarian awareness, and therefore, an increase of services provided for this sector such as specific vegan restaurants and offering healthier vegan choices in non-vegan restaurants and coffee shops.

3. How would you describe the state of workplace wellness in your country?

I have no doubt that this sector is in its early stages. There are a few companies that have in house wellness programs. However, there aren't wellness's known providers. The Israeli corporate market is extremely developed. Israel is known worldwide as a "Start-up Nation". With more than 3,000 high-tech companies and start-ups, Israel has the highest concentration of hi-tech companies in the world (apart from the Silicon Valley). Hence, I have no doubt this sector will develop soon and the gap between the existing need in Israel and the wide international knowledge and experience will close.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The general attitude is very positive. One development is investing in wellness hotels and modern spas that would also serve the community as a wellness center. There are a few super modern hotels are being designed. Another development is the increase of wellness in the public sector and insurance companies: better nutrition in public institutions, more wellness programs and increase of awareness in those sectors. Also, more conferences and forums are being held in the wellness and spa sectors that would spread the wellness spirit.

5. Whose responsibility is it to create a well world?

No doubt, it is the responsibility of each and every one of us. Especially ours as the ambassadors' of the wellness industry. We have the power to influence the communities, the businesses, the governments etc.

I certainly connect to the phrase "Think globally, act locally" and that is what we should do.

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ASIA: JAPAN

1. What is currently making news in your country when it comes to wellness or wellbeing?

-No.1 of Longevity: The life expectancy for men and women in Japan in 2014 is the highest ever recorded, according to a report released by the Ministry of Health, Labor and Welfare on July 2015. Japanese women took the top spot in average life expectancy worldwide for the third consecutive year in 2014 at 86.83 years, while Japanese men climbed a notch to tie for third place at 80.50 years. (The data covered 49 countries plus Hong Kong.) Japanese women have enjoyed the world's longest average life expectancy since 1985, except in 2011 when they fell behind women in Hong Kong in the aftermath of the massive earthquake and tsunami in the northeast region that March. According to the KYODO news, the results "seem to reflect the progress in medical treatment. Average life expectancy may still be extended," a health ministry official said, citing improving survival rates for cancer, heart disease, cerebrovascular disease and pneumonia.

Japan has a "universal health insurance regime" to ensure that anyone can receive necessary medical treatment. Under this regime, every citizen enters a publicly regulated medical insurance system, such as employees' health insurance or national health insurance. This medical care system has contributed to Japan's achieving the highest life expectancy in the world, as well as a high standard of healthcare along with improvements in the living environment and better nutrition.

-Cost for Longevity: However, reform of the whole system is being undertaken in order to preserve the stability of this medical insurance system in the future. Currently, national medical care expenditures have been severely increasing. In fiscal 2012, the expenditures totaled 39.2 trillion yen (about US\$ 327 billion) or 11.17 percent of Japan's national income. Especially, medical costs for treating the latter-stage elderly were 13.7 trillion yen (about US\$ 114 billion), or about one-third of national medical care expenditure, and accounted for 3.89 percent of the national income. The per-capita cost of medical care for the latter-stage elderly averaged 919,452 yen (about US\$ 7,669) for the year. Rising medical costs for the latter-stage elderly, resulting from the rapidly aging population, etc., is one of the major contributors to the overall uptrend in national medical care expenditures.

-Mental Control for Longevity: Worse more, due to the increasingly complex social environment created by a highly-technological, competition-oriented society, the stress levels felt by all age groups are rising. The number of suicides in Japan was 26,063 in 2013, and had remained at the same level of around 30,000 a year since 1998. In order to cope with those issues, the government will require employers regularly employing 50 workers or more to offer an annual stress check to

employees from December 2015.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas & Wellness Tourism: Ryukyu University, a national university located in Okinawa Island, has been successfully provided the Spa Management Course for their current students and professionals from the Spa industry and they create many of innovative plans of spa development project and its wellness tourism.

Wellness Living Communities/Real Estate: Supported by the Ministry of Education, Culture, Sports, Science and Technology (MEXT), highly evaluated universities and innovative enterprises from various industries have been dedicated to their research with local community at 12 core sites and 11 satellites for several Center of Innovation (COI)'s themes such as "Smart Lifecare", "Nurturing Mental Welfare", "Platform on big life data from unconscious sensing to support human and social well-being", "Self-Management Healthcare Sustainable Life Care, Ageless Society", "Development of an innovative strategy for disease prediction and prevention by combining neuroscience research and analysis of big health data", and so on.

Beauty, Fitness & Nutrition: RIZAP, the emerging group of personal training gyms, succeeded to establish the style that they are absolutely committed to producing results toward the body what their clients required, by customized 1-on-1 exercise programs, personal trainer's dietary control with nutrition, all under the guidance of a nationally-registered dietitian.

3. How would you describe the state of workplace wellness in your country?

-Incentives for Employee's Health and Productivity Management: The Ministry of Economy, Trade and Industry (METI) and the Tokyo Stock Exchange (TSE) for the first time, jointly selected 22 enterprises (including Japan Airlines, ASICS, Konica Minolta, TOTO, Terumo etc.) as the "Brand of Companies Enhancing Corporate Value through Health and Productivity Management (Health & Productivity Stock Selection)" and on March 2015 (http://www.meti.go.jp/english/press/2015/0325_01.html).

The Health & Productivity Stock Selection is a program in which METI and TSE select and introduce attractive enterprises to investors who prioritize improvement in corporate value from a long-term perspective. METI and TSE aim to make the program an incentive for more enterprises to undertake health and productivity management.

In connection with the above, the Development Bank of Japan (DBJ) has been provided its loans to some enterprises under the DBJ's health management rating

system. This loan system, the first of its kind, is intended to actively support health management efforts in by introducing technical methods for rating health management, in which DBJ evaluates and selects companies with superior health-conscious initiatives for employees and reflects the findings in its loan conditions. Kao Corp., one of the highest rated enterprises (a major Japanese household products manufacturer) by the system, has been working to determine and analyze the health condition of employees from in-house information, including health check data and individual research, and has established a system to implement measures based on the results in cooperation with businesses, health insurance associations, industrial physicians and outside experts. The company has also appointed a person to be in charge of health promotion in the office, while offering opportunities to report present conditions to management through a committee promoting health control to make further improvements.

-Mandatory Stress Test: From December 2015 amendments to Japan's Industrial Safety and Health Act will require employers regularly employing 50 workers or more to offer an annual stress check to employees. This will include staff on secondment to overseas offices. These amendments are aimed at preventing work-related mental illness, by helping employees to identify impacts of stress and helping employers improve the work environment through collective analysis of data. The Act also requires employers to establish a 'health committee'. The health committee will be expected to oversee introduction of the stress check system and arrange for tests to be conducted. For stress checks, employers will have the option of using: (1) stress check software; (2) another form of stress-check test; or (3) a set of Ministry questions. Using this occasion and opportunity, many innovative stress check solutions are introduced in Japanese market at the moment.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

With the 2020 Tokyo Olympics only 5 years away, a stream of huge complex buildings and 5-star hotels are under construction in central Tokyo. Especially, Aman announces plans for a second property in Japan, following the successful launch of Aman Tokyo in December 2014. Amanemu will debut in the first quarter of 2016 in Ise Shima National Park in Honshu's Mie Prefecture, central Japan. It will be the brand's first hot spring resort. Celebrating Japan's ancient onsen (mineral hot spring) tradition in serene natural surrounds, Amanemu is perched on the shores of Ago Bay, known as the 'Bay of Pearls'. On the other hand, Hotel Okura, a traditional prestigious domestic brand closed recently to rebuild the main building for a hefty 100 billion yen (= about US\$ 1 billion), with a grand reopening slated for 2019. Hoshino Resort group also is set to open Hoshinoya Tokyo, a Ryokan-type facility with Onsen (natural hot springs) even in central Tokyo in 2016.

Mitsui & Co., Ltd with Mitsui Fudosan, the largest real estate enterprise in Japan, also rebuilt Mitsui's main buildings with surrounded buildings located at the right next to the imperial palace. They will have the world prestigious foreign hotel and spa.

5. Whose responsibility is it to create a well world?

Firstly, I think the politicians have the responsibility to create a well world. Secondly, the employers must have that. And lastly, I dare to say that every single person should have that.

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ASIA: JAPAN

1. What is currently making news in your country when it comes to wellness or wellbeing?

Japan is one of the fastest countries in the world that is reaching an aging society. We are currently quite well protected by government medical insurance. However, this insurance fund is in a critical situation due to the rapid rise in medical expenditure by those over 80 years of age. Japan is known for its people's long lives. However, the last 10 years are often not good, with the time spent in bed, or undergoing serious medical treatment.

The Government has started to make more expenditure for prevention and a wellness life style. This year is a kind of initial year, with the government putting serious pressure on the medical association. We've seen this as part of the TPP (trans-Pacific Partnership) negotiations.

Currently our health insurance system does not cover prevention or health check expenditures. I am expecting this will change soon, allowing both to be partially covered.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Preparation for inbound tourists is booming (foreign visitors have surged over the last two years; their expenditure is almost the same as the game industry in Japan).

Wellness Tourism: Still under developed. However, Hoshinoya and some of the hotel resort groups are introducing Wellness Tour, which is quite popular among affordable office ladies and the affluent elderly.

Beauty: Stem cell and anti-aging products are popular.

Fitness: Currently booming is "Rizap" Japan. It says that after only two months, your body is totally changed. It is personal trainer and food coordinators collaboration to make drastically change customers' body to a good shape. TVCM is also very popular. Mass Production of Personal Trainer. <http://www.rizap.jp/>

Nutrition: More and more supplement is taken by Japanese consumer, especially current trend is Gut flora in terms of gut microbiota, which is consists of a complex community of microorganism species that live in the digestive tracts of animals and is the largest reservoir of microorganisms mutual to humans. Meiji Milk Products and Yakult is advantage of this area and share price was surged as a result. personal trainer's dietary control with nutrition, all under the guidance of a nationally-registered dietitian.

3. How would you describe the state of workplace wellness in your country?

Company's serious problem is employees' melancholy. Government suggested the employees' monthly check by corporate whom employ. Problem now is more psychology rather than physical. (Physical examine by company is well penetrated in Japan by health insurance association system).

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Because of Abenomics, Japanese economy is kind of recovering now and new big project has been on the way to complete till year 2020, which Olympic games is held in Tokyo Japan.

5. Whose responsibility is it to create a well world?

Wellness sector and government collaboration with prevention oriented doctors.

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ASIA: LEBANON

1. What is currently making news in your country when it comes to wellness or wellbeing?

Lebanon is a beautiful country, a popular tourist destination despite conflict in the region. It is renowned for its over-the-top night life, luxurious beach resorts and the exceptional ski season... Making news recently however, is the medical and Wellness tourism, especially from neighboring countries. Wellness centers are on the rise and retreat programs are increasingly more popular. There is greater awareness and demand for Wellness services and a bustle of health-oriented businesses.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Spas in Lebanon are now widening the spectrum of their services to include a heaving menu of options for Wellness seekers.

Wellness Tourism: Wellness tourism as mentioned earlier is on the rise, with resorts, hotels, and centers offering retreats, detox programs, yoga & meditation events and more...

Real Estate: Real estate is a busy sector in Lebanon and many projects have now been focusing on energy-efficient compounds, with large green spaces, gyms, sports facilities and spas.

Beauty: The beauty sector in Lebanon is renowned across the Arab world. It is integrating into the Wellness centers (or the other way around) and making some attempts to shift towards more natural products.

Fitness: Yoga, Pilates, Tai Chi and new disciplines such as Nia are forming a relatively large fraction of the Fitness sector in Lebanon and with increasing popularity...

Nutrition: In nutrition, we are seeing much interest in juicing, organic and clean eating and many small businesses and centers catering to this demand.

3. How would you describe the state of workplace wellness in your country?

Lebanon is beginning to catch up on workplace wellness and its endless benefits towards team building, higher productivity and a more positive atmosphere in the workplace.

Recently, EddéSands has received various requests for groups from banks and diverse companies to spend half days on wellness journeys including spa treatments, wellness meals, activities such as Yoga or AquaFitness and even lifestyle workshops on subjects such as stress management, proper posture in the office, breathing techniques, etc... Alternatively, when they book our conference venues, the “Wellness coffee break” and the Wellness lunch are increasingly favored over other options.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Taking into account the region of North Lebanon alone, the year 2015 has witnessed the inauguration of many spas, massage centers and massage sections in beauty salons. Yoga and Pilates centers are also on the rise, as well as life coaching and alternative medicine clinics. This is due to higher demand among the exceedingly stressed Lebanese public due to economic and political struggles in our society.

5. Whose responsibility is it to create a well world?

To begin the process of creating a well world, governments are the first to be held responsible for raising awareness starting with awareness campaigns for the public and in school programs, controlling product information and imposing fines for any form of pollution and false marketing of wellness foods and products, and finally creating financing possibilities with low interest rates for all Wellness related businesses. Following governments are companies who should implement workplace wellness, and provide educational workshops for their staff. Finally, wellness-related businesses should provide services to their best capacity.

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Eddésands
HOTEL & WELLNESS RESORT

ASIA: PHILIPPINES

1. What is currently making news in your country when it comes to wellness or wellbeing?

- a. The Philippines recently co-chaired the creation of a 2015 APEC Healthy Women Healthy Economies Policy Toolkit which compiles policies and best practices to help governments, companies, and NGOs to improve female labor force participation through better health. Five focus areas were Workplace health and safety, Health access and awareness, Sexual harassment and gender based violence, Reproductive health and Work life balance. The toolkit was launched at the 2015 APEC Women in Economy Forum in Manila in September 2015. I was invited to be part of this initiative to represent the wellness sector. We worked hand in hand with doctors from different countries to finalize the toolkit. This is an indication of wellness being recognized as an integral part of the health and well being industry.
- b. The Asian Society of Lifestyle Medicine (ASLM) has recently been formed . The ASLM is a group of healthcare practitioners who use lifestyle interventions in the treatment and management of disease. More doctors in the country subscribe to the use of natural treatments in the prevention of diseases but prefer evidence based lifestyle approaches. It is good to be able to represent the wellness industry in the Philippines as a founding member of ASLM.
- c. The Philippine health and wellness industry continues to grow spurred by the improved consumption of health and wellness products to prevent illnesses. Besides the rising health consciousness, The expensive cost of medical treatment also encourages consumers to be more proactive in taking charge of their health.(Euromonitor June 2015).

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Hotel spas are recording the fastest growth as consumers see spas as a “Must Have” for hotels and resorts. Day spas are challenged by the home massage industry which has become more sophisticated, with the spa experience being delivered at the client’s home.

Wellness Tourism: There is a growing interest in integrating wellness into a holiday. Filipinos based abroad avail of executive check ups, dental treatments, aesthetic treatments, detox and spa treatments when on vacation.

Wellness Living Communities/Real Estate: No major developments in this area.

Beauty: Aesthetic clinics and other beauty related businesses are growing tremendously. Anti aging treatments, whitening, weight loss programs continue to be popular with stem cell treatments getting more interest.

Fitness: Large growth in this industry with branded fitness chains coming into the country.

Nutrition: High interest in healthy and organic food and naturally healthy products. Organic markets, farm to table concept are growing in popularity. Upsurge in herbal products being sold in the market.

3. How would you describe the state of workplace wellness in your country?

Increasing interest as more companies are burdened by the cost of sickness. Many companies are introducing work place wellness through zumba classes, yoga and health talks but need an integrated approach to make behavioral change happen. Nurture Wellness Village has pioneered in introducing “**The Work Well Project**” which is a fun, interactive and educational corporate activity designed to jumpstart and educate employees on sickness prevention through better health.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Investment has been limited to spas in hotels and resorts and provision of (some) healthy alternatives in the restaurant sector, but not much. Investors have been more focused on building more medical facilities all over the country.

5. Whose responsibility is it to create a well world?

Each individual should take responsibility to create a well world. When you start with the individual, you impact families, then communities, then countries then the rest of the world.

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ASIA: SAUDI ARABIA

1. What is currently making news in your country when it comes to wellness or wellbeing?

There is quite a rise in healthy lifestyle promotions amongst young adults, along with several campaigns against junk food. It is moving beyond a focus on individual behavior towards a wide range of social and environmental interventions.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following: Spas; Wellness Tourism; Wellness Living Communities/Real Estate; Beauty; Fitness; and Nutrition

City municipalities are building more walkways for the public and open air workout equipment. A leading fitness brand is expanding into more than 100 locations this year to meet the growing demand.

3. How would you describe the state of workplace wellness in your country?

More companies are adapting health education programs for employees, in-office exercise rooms, and competition in local marathons. Standing office desk is becoming a trend in startups and large corporations alike. Preventive care is also a focus this year and widely practiced.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

With government regulations remains strict with this sector, there is a level of reluctance to invest heavily. Enaya as a leader in this area is driving efforts with its recently launched beauty academy that aims to develop more professionals for this industry. This program should subsequently satisfy the government Saudization goals and create a large enough wave to showcase the viability of this sector to officials.

5. Whose responsibility is it to create a well world?

The responsibility starts from every individual within society who must lead a healthy lifestyle by example and influence his community to follow suit. This should create a ripple effect that impacts the whole world.

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ASIA: SRI LANKA

1. What is currently making news in your country when it comes to wellness or wellbeing?

Wellness is somewhat an oxymoron in Sri Lanka in the current context. While it has been practiced for over 5000 years in Sri Lanka and is a core way of life, the term “wellness” is not prevalent in day-to-day life in Sri Lanka. Most Sri Lankans just live a well life.

Buddhism, which is the main religion in the country, attends to the wellness of the mind and spirit, Ayurveda tends to the wellness of the body. Ramayana, the Hindu epic, describes how Ayurveda was first introduced in Sri Lanka:

“Hanuman leaps over the ocean, and across the whole of India, to the Himalayas. When he arrives at first he can’t find the Medicine Mountain. When he finds it at last, it is covered with herbs and he doesn’t know which is the magic healing herb. So Hanuman wraps his arms around the whole mountain, pulls it out of the ground, lifts it up onto the palm of his hand and flies with it back to Lanka”

However, in today’s world context, Sri Lanka is just conceiving wellness as an industry. The country is realizing that there is this buzzword and trying to associate multiple different things with wellness from spa’s to Ayurveda.

However, Sri Lanka is well positioned in the region and may be the whole world to become one of the top wellness tourism destinations. Many factors contribute to this including:

- **Location and accessibility** – Sri Lanka is centrally located between the so-called east and the west of the world providing a great mixture of culture, food, etc. Sri Lanka is closer to any Middle Eastern, European, or Americas East Coast tourist than Thailand or Bali, the leading destinations in wellness tourism. With the end of the civil war that plagued the country for decades, Sri Lanka is becoming an aviation hub with almost all of the world’s airlines coming to Sri Lanka directly or through code-sharing partners.
- **Mindfulness culture associated with Buddhism** – Over 70% of the population of Sri Lanka is Buddhist and Sri Lanka hosts the holist Buddhist temple of the world, the Temple of Tooth, Kandy, where Buddha’s tooth relic is kept.
- **Ayurveda and traditional healing** – As mentioned above, Ayurveda pre-dates the recorded history of Sri Lanka and has been practiced in the island for over 5000

years. Apart from Ayurveda, there is a traditional system of healing in the country that is still widely practiced.

- **Highest density of world heritage sites** – 8 UNESCO world heritage sites within 26,000 square miles, make Sri Lanka a top tourist destinations in the world. While the potential for wellness is immense as described above, there is not a single dedicated wellness resort in the country. A major break-through was achieved, in this regard with the launch of “Santani” slated to open in early 2016. Santani, is the first integrated wellness resort in Sri Lanka and made headline news throughout the region.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Sri Lanka does not have a single fully-fledged spa at the moment. There are few urbane and hotel based massage centers. However, vice is more associated with these than wellness of any sorts with a common belief that you can end up with a “happy ending” from these establishments. Santani is filling this gap for the first time and will be the first and only destination spa in the country.

Wellness Tourism: Sri Lanka does not have a single fully-fledged spa at the moment. There are few urbane and hotel based massage centers. However, vice is more associated with these than wellness of any sorts with a common belief that you can end up with a “happy ending” from these establishments. Santani is filling this gap for the first time and will be the first and only destination spa in the country.

Wellness Living Communities/Real Estate: Does not exist.

Beauty: Beauty is a fast growing area with the rapid increase in the per capita GDP and the resulting increase in dispensable income since the end of the civil war.

Fitness Fitness in general is popular with Sri Lanka being a very outdoorsy country. However, it is still in an infant stage with limited qualified human resources available.

Nutrition: Does not exist in the wellness sphere.

3. How would you describe the state of workplace wellness in your country?

Sri Lankan work place is still a relatively stress free place with most employees enjoying higher job security and work-life balance. Hence there is not much emphasis on work place wellness.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

While wellness is used, as a means to sell standard hotel rooms, there is no proper integrated wellness facility or resort in Sri Lanka. However, as mentioned a major breakthrough was achieved with the launch of Santani, Sri Lanka's first wellness resort and destination spa. Since then multiple projects have come up in wellness related investments.

5. Whose responsibility is it to create a well world?

Everyone from employers to employees, retailers to consumers, healthcare industry to insurance industry, education sector are responsible as keeping the population healthy or well is lot more productive to the whole world and lot more cost effective than caring for a sick population. It is more than the cost of healthcare but rather the lost productivity of the populace.

There is a special onus on the research industry as there is still very limited clinical or other research based consensus on most of the therapies provided within the wellness space. As long as these therapies associate the pseudo science tag, it will be difficult for the industry to truly achieve its potential.

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AUSTRALIA: AUSTRALIA

1. What is currently making news in your country when it comes to wellness or wellbeing?

Increasingly, popular clean eating campaigns encourage consumers to try exotic powders, potions, tonics and treats imported from far away destinations.

The marketing campaigns employed often portray wild jungles, remote lush regions, and happy and sustainable working cooperatives.

I investigated the health claims attached to the Superfood trend, and open a pathway of enquiry as to what constitutes 'super', how is it defined, and to create a theory for the purpose of naming a food 'super'.

The particular challenge of my research is authenticating claims of superfoods for their clinical and ecological impact, and should we consider monitoring those claims so they are more specific and ultimately more transparent for the consumer.

The phrase Superfood is becoming increasingly utilized amongst healthy food lovers, yoga students and foodies around the world.

However, at this point there is no clear definition of what the word actually means and the scientific, evidence based research, is either conflicting, curative, or completely unsubstantiated.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: A step further toward the medi spa

Wellness Tourism: A rapidly growing sector

Wellness Living Communities/Real Estate: Slow

Beauty: Consumer demand for natural skincare, preservative free

Fitness: Wellness is the new fitness

Nutrition: We must take into consideration food miles, fluorescent light from storage and handling procedures and intercontinental transit rules and regulations and

consider sustainable food practice, food ethics – such as fair trade certifications, the Superfood trend promotes appeal to ethical consumers and health advocates.

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AUSTRALIA: AUSTRALIA

1. What is currently making news in your country when it comes to wellness or wellbeing?

Despite the Australian economy currently not providing any real certainty, there has been reasonable growth in the spa and wellness industry overall. At Peninsula Hot Springs we continue to experience approximately 10% growth in visitation year on year with all trends indicating that will continue through 2016.

There is about to be major growth in the hot springs business in Australia with at least three new players in Victoria about to invest in Hotsprings developments. We welcome the introduction of new Hot Springs offerings and look forward to working with them to develop a region famous for bathing and all that goes with it.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Making the experience unique and living up to the business purpose/promise

Wellness Tourism: Why travel to Asia for a life changing wellness experience when we have the environment and greater expertise right here in Australia.

Wellness Living Communities/Real Estate: People are choosing to live in a community based on their interest and the opportunities that it provides.

Beauty: The move towards treatments that have proven results

Fitness: Fitness is moving in a positive direction towards functional fitness that supports your lifestyle.

Nutrition: Too much sugar is the new smoking.

3. How would you describe the state of workplace wellness in your country?

I have noticed a greater emphasis on business supporting employees with mental health issues. We recently experienced a very successful RUOK day at Peninsula Hot

Springs. RUOK day encourages individual staff to check in on other staff to make sure they are ok. Our consulting psychologist spoke to the staff and encouraged people to talk about any stress, sadness or depression they are experiencing. As a result a number of staff reached out and we were able to get them professional help. I see generally the state of workplace wellness in Australia as improving greatly over the past 5 years as a result of both OH&S and Human Resources departments taking the employee health and wellness on as a departmental responsibility and developing relevant Key performance indicators. An example of that shift of emphasis is that it is no longer called Human Resources (HR) but instead referred to as People and Culture (P&C).

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

I can see a very real philanthropic movement developing for very successful individuals to invest in wellness businesses to give something back to the community. Bharat Mitra who is the owner of Organic India has invested in Peninsula Hot Springs and describes business as a vehicle of consciousness. Yes he is a very successful businessman but his priorities reflect his purpose in life, which is to make a positive improvement in the lives of the community.

5. Whose responsibility is it to create a well world?

Everyone has a role to play creating a well world.

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AUSTRALIA: AUSTRALIA

1. What is currently making news in your country when it comes to wellness or wellbeing?

Over the past 12 months there has been a lot of things opening up. A Science based current affairs program on Public Broadcast Television called “Quantum” aired a stunning two part series on Cholesterol and Cholesterol drugs, revealing “the other side of the story” and creating a great deal of controversy and discussion.

They also did a two part series on gut health, gut flora and recent advances in understanding about the Gut-Brain connection, mental health, immunity and disease prevention.

Also over the past year there has been a major increase in the number of campaigns and discussions about Mindfulness Practice.

There has also been an explosion in the amount of different varieties of Kombucha Teas and Kefirs available in health food stores and some supermarkets. This includes a variety of boutique businesses doing some really creative work in the area.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: The entry of big investors into this market will drive it forward. The foundation of this industry in Australia is strong. I get a sense that when Corporates decide to embrace the industry, it will really take off again and become much more profitable.

Wellness Tourism: With the declining value of the Australian Dollar against other major currencies, tourism is strong. Tourism is up 7% this year on last year, with the biggest group of arrivals being for leisure, an increase of 4.2% on last year. This indicates an expanding market for wellness related services, including spas.

Wellness Living Communities/Real Estate: There are some continued initiatives with new ideas and designs for housing estates. Certainly retirement villages are really reaching for a wellness model with a great deal of focus on active living and supportive and connected communities. A great deal of effort is going into keeping people connected.

Beauty: This is not really my area of expertise.

Fitness: The Fitness Industry is ever expanding in Australia. There are more health clubs than ever before. 24 hour clubs are popping up all over the place and bootcamps are everywhere. Many more people are taking up group exercise and seem to be enjoying the experience.

Cyclists: they say that cycling is the new golf. Around the major cities on the weekends, literally thousands of cyclists are streaming along major scenic roadways like Melbourne's Beach Road. One can witness big pelotons in the early mornings on weekdays too.

Jogging: The increase in cyclists has not seen a reduction in joggers. Especially when the first day of spring rolls around, the numbers of early morning joggers multiplies.

Yoga and Pilates studios are popping up all over the place. There seems to be a new style of yoga every month. The hot room Yoga seems to be really popular in Australia.

Technology is continuing to expand when it comes to fitness. The use of Fitbits, smart watches and smart phone apps has also continued to expand over the past year. The huge rise in participation in fun runs and triathlons has seen an expanded interest in self-measurement and personal performance monitoring.

Nutrition: Over the past twelve months there has been some controversy as one of the country's most celebrated chefs has written a book and has been openly promoting Paleolithic Principles in his shows, in interviews and in the print media. His love and passion for "Paleo" is palpable. He is creating opponents in some circles and many fans in others.

Also, as stated in section 1, the use of fermented foods and beverages has escalated incredibly over the past 12 months. We are also seeing a continued increase in the appearance of Network Marketing Companies promoting Nutritional Products.

3. How would you describe the state of workplace wellness in your country?

There is a move away from the traditional health testing, which was basically designed to tell people how unhealthy they are and how urgent lifestyle change is. This whole sector took a major downturn after September 2008 and providers became very conservative and careful. Wellness is now coming back in using non-traditional approaches. Fatigue prevention has become very marketable as it ties in closely with risk reduction. Companies have big budgets in these areas. Of course a person with a high level of personal wellness also has a much higher tolerance to fatigue.

Mindfulness Practice Training is very popular in Australian Workplaces.

Big Work Cover (Workers Compensation) Insurance companies are getting in behind wellness in a big way. In 2013 and 2014 The Work Cover Authority in Victoria provided a comprehensive program of workplace health checks right across the state. The results were quite appalling and a directive was sent out to the big insurers telling them they had to do more to encourage their client businesses to do more to promote wellbeing to their employees.

We are also seeing a shift away from testing to coaching. Life coaches are supporting people to get a greater sense of what they really want, then supporting them to take steps in that direction. As personal inspiration rises, so does motivation for change. I am also seeing an increase in the number of business funding their employees to attend self-development programs like Avatar.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

In 2014 a large organisation named The Belgravia Group, which already had major investments in Fitness Centres, Recreation Centres and Fitness Equipment supply under their Belgravia Leisure arm, took over the ailing but widely known Hepburn Springs Bath House and Spa and turned it into a commercial success. They have now decided to move into this market and acquired businesses with potential and grow them. They have a big intention to become a major player in the Spa Industry in Australia.

5. Whose responsibility is it to create a well world?

Each individual. Even though negative and destructive behaviors continue, every person in the western world knows at some level that many things they do are detrimental to their health. It is however up to governments and community leaders, and employers, to inspire people to take action. Inspiration is a key that unlocks possibility.

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EUROPE: AUSTRIA

1. What is currently making news in your country when it comes to wellness or wellbeing?

Measurable results of wellness products and services in order to assure the positive effects. Development of health oriented products that fulfill quality standards. Market saturation in traditional wellness products. Development of clear USPs and target groups.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Wellness as a lifestyle philosophy of lifetime development in every area of life: at home, at work, in spas, and communities.

3. How would you describe the state of workplace wellness in your country?

Very high, with initiatives from private companies up to public organizations. For example, there is a countrywide network of corporate health offers:

<http://www.netzwerk-bgf.at/portal27/portal/bgfportal/content/contentWindow?contentid=10007.701055&action=2&viewmode=content>

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

In recent years, the tourism and leisure industry, thanks to low interest rates set a pace of investment above the overall economy. Sectors of investment are: quality Improvement, Company size optimization, diversification, Creation or improvement of staff quarters, Environmental / Safety / Accessibility / energy saving measures.

5. Whose responsibility is it to create a well world?

Every living creature should be praised for a collective, peaceful, sustainable and healthy way of life.

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EUROPE: BULGARIA

1. What is currently making news in your country when it comes to wellness or wellbeing?

In Bulgaria is gaining speed the application by more big part of citizens the healthy lifestyle practices and going back to nature. Europe needs social innovations and the best high reserve (potential) is in the development and implementation of Wellness & SPA Industry, Well-being practices, Wellness Life Style, Healthy quality of life and Longevity. Therefore, in the century of information society arises the need for "health prevention of the healthy active taxpayer", which is the most important element in the system of an economy based on knowledge, and which alone can create smart and inclusive growth.

The Bulgarian government promises to invest over \$10 mill. to build a new National Research Center for the Study of mineral water, volcanic stones, mud, Peloids and herbs from protected areas. The ultimate goal is the development of new therapies, creative and recreational practices, aqua practices, well-being modeling technologies and advanced therapies by transmitting information to the memory of water. A parallel objective of the construction and equipment of this research infrastructure is the development of doctoral and master academic programs to form staff for the spa and wellness industry in Bulgaria and the Balkan region.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Bulgaria has a vast potential for all types of Wellness, SPA, Thalasso and medicalspa tourism, with its hot springs and Peloids areas in all the country.

Black Sea climate and thalassotherapy resorts are famous. The most beautiful is the ability to apply simultaneously in one place 38-39 degrees sweet mineral water and 22-24 degrees sea salt water. Now over 1000 rehabilitation and recreational centers are expecting modernization with the financial support of the EU.

Hot Springs Spas: Bathing in hot springs within a therapeutic medicalspa experience is a burgeoning trend but in Bulgaria they have an historical tradition coming from the antiquity, since the Roman legions: Velingrad (water flow rate of 17 l / sec.), Petrich (water flow rate of 35 l / sec.), Sandanski (water flow rate of 29 l / sec.), Hissar (water flow rate of 22 l / sec.). Under the Capital Sofia exist 49 different mineral springs.

Wellness Living Communities: The Bulgarian NGO,s sector is attempts to identify measurable parameters for creates a standard for the “Bulgarian governmental Wellness index”, specific measurable parameters for the wellness touristic destinations and wellness workplace along with physical, mental, social, emotional, and other types of wellness.

Hotel Spas: Aromatherapy with the Bulgarian rose “Damascena” plays a role in pain or recreational therapies, beauty, Peloids treatments, improvement of cognitive function and therapy for the quality of sleep. Like a touristic Destination Bulgaria have more than 2000 Spas are looking beyond traditional pampering towards technology, swimming pools, spa suites, post-relaxation decks — all designed to make spa synonymous with luxury.

Wellness Tourism: A high number of the Bulgarian hotel brands are expected to fully integrate their wellness approach in harmony with the new Bulgarian Law for Tourism. Many already offer fitness rooms and spa treatments, but we will soon see hotels with innovative wellness offerings.

3. How would you describe the state of workplace wellness in your country?

As a Member State of the European Union Bulgaria actively apply the horizontal policy of the “green philosophy”, “green thinking”, “green jobs” and others. The Bulgarians has a rich folk tradition. Over 83% of the population practices Bulgarian folk dances. In the tourism we offer programs for team building, which are based on the historical tradition and elements from old rituals (existing 1300 years ago). Folk songs contain musical phrases from the instrument bagpipes, whose vibration are close to 21MHz and have Recreational influence on the human body. From 3 years ago was introduced a national scheme for free distribution of 2 apples and 500 ml of water in all schools and government institutions. It's only the beginning.....

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Bulgaria has a flat tax (10%), which is interesting for the business and attract foreign investment annually. In the last five years, their respective market shares are over 60% directed to the spa and wellness facilities.

5. Whose responsibility is it to create a well world?

The responsibility for better and positive world belongs to everyone on Earth. Positive thinking and healthy lifestyle harmonize the bio-energetic balance of people, which instantly create a positive and harmonious social environment. Wellness lifestyle is especially important one for the young generation around the world, which teaching them how care about nature and courageous dreams in support of the social innovations.

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EUROPE: FRANCE

1. What is currently making news in your country when it comes to wellness or wellbeing?

FRENCH SPA ASSOCIATION SPA-A initiated a pioneering initiative concerning Eco-responsible Spa Management. The works were coordinated by EVEA TOURISME & IN-EXTENSO agencies, with the support of ADEME, French National authority for sustainable energy [Agence pour le Développement et la Maîtrise des Energies]. 15 wellness properties participated to the panel : urban spas, hotels spas, Thalassothérapies, balneo centers. The key learnings will be transformed into best practices and shared with the industry. The whole programme will be presented during COP21 [United Nations Programme for the Environment] that will be held in Paris and lead by French Président François Hollande, from November 30th until December 11th.

Mad about Cosmeceuticals. When polysensoriality gives way to technology, state-of-the-art formulas and understated packaging, what you have is cosmeceuticals. Cosmeceuticals lie at the crossroads between traditional cosmetics, pharmaceuticals and medicine, and are enjoying a surge in popularity. This upmarket cosmetic science falls within the scope of expert treatments with highly technical formulas that satisfy our desire for eternal youth. With a market worth 540 millions euros in France, alone anti-ageing has become a sort of holy grail with cosmeceuticals leading the pack both in terms of market share and increasing renown, and this serves the interest of aesthetic medicine as well. Indeed, cosmeceuticals also aim to give answers to a clientele that resorts to injections and laser sessions where skin treatments, both before and after, have become necessary. Here in an underlying trend that has not escaped the notice of thalassotherapy centres, Spas and balneology centres. Some have already integrated in their offering the sector's leading brands – Skinceuticals, Filorga, Biologique Recherche..., even to the point of proposing invasive or semi-invasive techniques to clients during a treatment package stay. The lines are blurred between wellbeing, beauty and aesthetic medicine giving rise to complementary expertise so that tomorrow's outlook on beauty encompasses global wellbeing.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Impacted by the economic crisis, the French are focusing more and more on taking better care of themselves. 9 millions of them have turned towards wellness thalassotherapy, Spa, Balneotherapy and Thermal hydrotherapy in 2015.

The change in thermal hydrotherapy centres. Both operators and local councilors have become aware of the necessity to find new levers for growth. For operators, their differentiation strategy must above all be based upon their medical know-how. In the French healthcare market with thermal hydrotherapy programs that are authorized by Social Security, operators have the opportunity to position a new medical offering to reply to emerging therapeutic indications such as fibromyalgia, weight loss, dermatology and stress management.

Post cancer treatment programs become widespread in France. An increasing number of thalassotherapy centers and Spas are offering specific treatments to help people recover physically and emotionally after cancer.

New generation thalassotherapy inspiring clients to engage in a preventive health process while are enjoying their Thalassotherapy break and to enjoy the benefits of seawater: rich in trace elements and minerals essential to our bodily functions and is recommended for many disorders.

Wellness Tourism: Wellness Tourism is a major concern in France. A working group, led by ATOUR FRANCE Wellness Cluster, is in charge of taking France to the next level when it comes to Wellness Tourism, enhancing our urban spas, wellness resorts, sea-water spa/thalassotherapy centers, thermal spas in the whole country and promoting our expertise around the world. Wellness Tourism economy creates jobs. The analysis of major wellness destinations, both in France and overseas, reveals that a perfect command of the fundamentals is essential to a destination's success, whether for the facility itself (employee skills, level of medical offering expertise, the variety of wellness solutions, the modernity of its facilities) or for the destination's dynamic (quality and variety of accommodation, restaurants and shops, promotion of the region's unique resources by the tourist board with both public and private market players). The analysis also reveals that each destination must, and this is increasingly the case, word their offerings in appealing and tangible propositions, like in Carnac where the various wellness solutions all stem from a global concept based on sustainable development and organic products or in Aix-les-Bains where health and fitness are clearly targeted. We have also seen destinations develop their accommodation capacity for business travel or create kids clubs in order to diversify their customer base and expand their reach.

Maintaining or improving wellness is a well-established trend that represents great opportunity for the future with the ageing population and growing access to travel by millions of consumers all over the world.

Without a doubt, France has the potential to capitalize on international markets for growth thanks to its major resources and rich wellness offering. This implies that efforts to improve quality and innovate must be continued and internationalization processes must be accelerated. Thalassotherapy centers, thermal resorts and spas use the three waters; the wellness tourism sector has confirmed it has numerous classifications of sub-products, from the medical spa to weight loss properties, from beauty spas to health clubs or mindfulness retreats. I would like to see a collective commitment to the growth of wellness tourism in order to avoid counter-productive

actions and better promote this wealth of resources from a national perspective.

Wellness Living Communities/Real Estate: Wellness is a key component of our social environment. It is no more a trend. During the Women's Forum [Building the Future With Women's Vision] that will be held in Deauville, France, October 14-16, 2015, AccorHotels will lead a session on the "Future of Wellness" presented by Aldina Duarte Ramos, Global Wellbeing Product Director for Accor Hotels and Actress, wellness influencer Marisa Berenson. French Industry Secretary of State, Martine Pinville will be concluding the session.

Fitness The breathwork, designed to ideally complete the benefits of fitness, develops techniques that help each participant to increase awareness of their lung capacity, which is only partially used during normal breathing. Three protocols take place in different space according to the objective: in a pool of heated seawater (34°C) to help let go; in the fitness studio for focus and awareness of movement: Qigong postures for a sense of inner breathing, primitive dance and yoga exercises that are grounding and improve balance and stability; and outdoors to re-energize both body and mind. The sessions last for 30 minutes and include exercise such as sighing, stretching, yawning, rocking movements and immersion in water.

The Waff workshops. The Waff is an air-filled polyurethane cushion that comes in 3 sizes. Designed to adapt to every shape and size, it reacts to the user's movement requiring a continual search for balance. Associated with specific exercises, it is possible to work on improving posture, weight transfer and joint mobility, release muscular tension, activate the cardiovascular system and strengthen the muscles of the upper and lower limbs and abdominal muscles.

3. How would you describe the state of workplace wellness in your country?

Even though, in France, the OSI (International Social Observatory) recently made public a "commitment to workplace wellbeing and universal right to health". This document includes, for the moment, ten or so signatory companies and trade union organizations (GDF Suez, Schneider-Electric, Areva, RATP, Thales, La Poste, Malakoff Médéric, CFDT – French Democratic Confederation of Labour, CFE-CGC – French Confederation of Management, General Confederation of Executives, UNSA – National Union of Autonomous Trade Unions and the ETUC).

However, other big names already figure in the 'Great Place to Work' Hall of Fame: Microsoft, Valrhona, Decathlon, American Express Carte, Leroy Merlin, PepsiCo as well as Leboncoin.fr.

These companies all have in common an investment in improving working conditions and employee wellbeing: exemplary management, employee retention, salary levels, work-life balance, social benefits, diversity, development...

An investment that benefits employee and employer alike as all specialists agree on the fact that employee wellbeing improves overall performance levels and reduces

absenteeism. Employees themselves share this vision: 95.7% of them – when asked about stress at work – admit that wellbeing is key to performance and 55% think that their employers lack initiative in this area.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

There's not a tabloid, TV news program or conversation that doesn't bring up the subject of the economic crisis. At the same time, period of crisis are often favorable moments for seizing opportunities and accelerating projects.

Thalassotherapy, news centers with Concarneau (2015 July, HMC groupe) and Trouville (2015 January) – Renovations, in particular Thalazur Arcachon and Thalazur Saint-Jean-de-Luz but also Grand Hotel and Spa Saint-Jean-de-Luz. Miramar Port Crouesty (2015 May).

While awaiting larger investments, many center have been forced to look again at their strategic positioning and revitalize their offering with the launch of new courses of treatment and new treatment in order to distinguish themselves from the competition.

For the Spas, the inventory of high-end with/without a Spa was impacted by the new (NN) French classification system (implemented in July 2012). Today, we have enough perspective on the volume of new rated hotels to be able to evaluate the real share of hotel Spas in the French hotel industry.

We observed that 48% of the 5-star hotels in France have a Spa, representing close to 1 hotel in 2, compared to 17% in the 4-star category only concerns 1% of the rated hotels.

It should be noted here that the number of 3-star hotels grew by 38% in 4 years as a result of the new classification system.

Of the total number of 3 to 5-star hotels in France, 6% of them provide their clientele with a real Spa with a dedicated treatment offering. This offering is concentrated in the highest end of the market. Indeed, all categories taken together, hotels with a Spa only represents 5% of the establishments. These figures are taken from the quantitative and qualitative analysis of the French Hotel Spa Industry will be available at Atout France library at the beginning 2016 year.

5. Whose responsibility is it to create a well world?

Jules Renard, very famous French author used to say: “dreaming is the luxury of mind to create an ideal world”. For me create a well world is synonymous with

beauty, creation, eternity and know. Today, real well world is not about the accumulation of ostentatious signs, but rather sharing emotions, delighting the mind, turning ideas into reality and making what is impossible, possible! A well world is also related to defying what is evident and banking on discreet yet truly comforting places which allow forgetting the fierce obligation to always be fashionable.

We all have a role to play. We need to be curious, share and not be afraid of sharing. I like the following quote from French Author Victor Hugo: “Nothing is more powerful than an idea whose time has come”. And time is now!

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EUROPE: GERMANY

1. What is currently making news in your country when it comes to wellness or wellbeing?

The common trend of “self-optimization” has a certain impact on the wellness sector. Programs and treatments that make you look better, feel better, live healthier and increase your overall wellbeing as well as your performance in your job are favored by customers.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Spa is going back to the roots. Authenticity and regional aspects are the key words in almost every new development.

Wellness Tourism: The internationally recognized expertise of medical staff let Germany be one of the key destinations for health seeking clients in the future.

Wellness Living Communities/Real Estate: The concept of “Wellness Living Communities” is still widely unknown in Germany. However, discussions at conferences and blog entries indicate that this might be an upcoming issue.

Beauty: Technology seems to be gaining ground again. Customers are expecting “instant and visible effects”.

Fitness: Fitness is becoming ever more both social and virtual. Online exercises are on the rise. Wearables and the corresponding apps are widely spread among fitness enthusiasts.

Nutrition: Nutrition is more than ever a hot topic in German society. Genetically modified food and the wheelings and dealings of the big food trusts are questioned critically. Organic food and the benefits of a balanced and healthy nutrition are becoming more and more crucial aspects of Wellness.

3. How would you describe the state of workplace wellness in your country?

Workplace wellness is an issue since about three years now. Wellness Hotels, Fitness & Health Clubs and Physiotherapy Practices are offering corporate health management programmes that may take place onsite or off site. As always, Germany is very structured, organised and regulated in developing these offerings.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Investors and operators are more conscious about profitability and return on invest. However, there are still new projects being planned and built. Wellness facilities are vital assets in every new hotel or resort. Even the public sector (like municipal bathes etc.) are thinking about enhancing or amplifying their offerings towards wellness.

5. Whose responsibility is it to create a well world?

First there should be a definition of a “well world”. It might include ideas of how to build wellness enhancing houses or buildings. Wellness hotels could / should pioneer in this. But also public buildings should be refurbished according to well building standards.

Wellness providers (Spas, Hotels, and even Hospitals) should start promoting Wellness to the public. The Global Wellness Day is a fantastic opportunity to do so. Gharieni is supporting the Global Wellness Day as an Ambassador in Germany. This commitment is amongst other activities our contribution to building a well world.

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EUROPE: HUNGARY

1. What is currently making news in your country when it comes to wellness or wellbeing?

Innovation: genetic and molecular biology science research based therapies are currently making news – Hungary is traditionally strong in medical and balneological research and some of the best universities are dealing with this topic. Hungary has a new innovation support system and this activity is supported by the EU funds, the biggest operative program of the national development plan. Héviz has launched a new mud product line based on its really unique natural thermal lake and other spa product lines are also under development.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Spas with pool areas are built even for 3 stars hotels in the country but it is still rare to see a spa separately from a hotel or public bath.

Wellness Tourism: There has never been recession in this segment in Hungary and more and more hotels have built or transformed to wellness hotels. The number of treatment-users is also growing but more than half of the wellness customers still do not use any treatments.

Wellness Living Communities/Real Estate: Wellness living communities are not characteristic, but there are some initiatives in Budapest mostly based on fitness.

Beauty: In Hungary the beauty industry has an own network. The beauty industry continues to expand and men are gaining increasing attention. Eco friendly salons can offer a new line in hair care. The number of bio products is growing.

Fitness: Sports are traditionally important in Hungary, according to the good Olympic results (more gold medals than in much bigger countries). Fitness is more and more important for the Hungarians and number of middle aged people visiting fitness centers is increasing.

Nutrition: Manufacturers started to create healthier varieties of their products, including functional products helping to create health. The state tries to make effort to maintain good eating habits. Unhealthy products have to pay more tax. Canteens have to use less sugar and salt and more vegetables.

3. How would you describe the state of workplace wellness in your country?

Apart from the international companies the topic is not characteristic but there is a strong program for workers from the national health insurance system and the ergonomic standard is traditionally high and controlled by the state.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

According to the statistics the wellness hotels customers and their income are growing they are often working full with a healthy ratio between foreign and domestic customers. This fact can help the investor's decision.

The government has finished the modernization of the traditional thermal bathes in more than 50 cities. This has made the investment cheaper – a smaller indoor spa is enough for a wellness hotel.

Hungary has nice new wine spa hotels in Tokaj, Balaton and Villany but there are plans in Eger and in other places. There are traditional spa towns which are waiting for investors for 5 star hotels, including Heviz.

5. Whose responsibility is it to create a well world?

Everybody has to work on it including spa and wellness experts. This industry has possibility to influence people make them more health-conscious and to reduce stress.

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EUROPE: ITALY

1. What is currently making news in your country when it comes to wellness or wellbeing?

Wellness is more and more synonymous with prevention, good-balanced nutrition, and the appropriate combination of exercise and relaxation. Many traditional doctors are now offering integrated programs to support the health and beauty of their patients who demand and expect customized protocols and services.

Many blogs have flourished on these subjects, bringing cultural influences from other countries to Italy: they are particularly appealing to Millennials, along with the wide diffusion of mobile apps and technological devices supporting the commitment to self-care in everyday life, helping one to keep motivated, informed and to measure the results. Growing urban stress is compensated with short breaks, regenerating escapes to natural sites where it is possible to combine a well-being experience in spas and traditional thermal spa centers along with good-tasting food and various sports activities.

“Silent” eco-luxury hotels are also a new trend where one can escape to completely regenerate. A brand new example is the Adler Lodge Alpe di Siusi, Dolomites – part of the UNESCO World Heritage.

Another trend is represented by the Longevity Retreats offered by more traditional thermal spa locations where history and wellbeing meets a modern integrated approach. One of the most famous, and appreciated also by international clientele, is the Fonteverde Hotel in Tuscany, recently awarded by Spafinder as the Best Countryside Hotel in Italy.

Moreover, naturally healthy and organic products, according to a recent Euromonitor study, are performing better and better, proving that a deep change of consciousness is really taking place, positively influencing the consumer’s choices despite their reduced disposable incomes.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: The most interesting Italian phenomenon is represented by the mini spas developed within pharmacies, which are now starting to offer medical, nutritional and beauty solutions. More than for the numbers of new openings, it is really significant since it shows that the connection between health, beauty and wellness is now

perceived as essential and that the integrated approach is becoming mainstream. In many regions, spas are also part of the winning strategy implemented by hotels to attract national and international clientele and to 'de-seasonalize' their offer.

Wellness Tourism: Tourism performed well in Italy particularly thanks to the domestic and international wellness travelers attracted by our unique combination of wellness, nature, art and culinary cultures. A new component of wellness tourism is represented by fitness tourism, which combines the pleasure of being in beautiful natural and historic locations with a variety of specialized sporting activities.

Wellness Living Communities: They do not exist in Italy except for a few hotel/resort spas which offer the possibility of spending time in independent villas or condos close to the local thermal spa. Italians still prefer to have their own near-home spa and gym or to move to touristic wellness locations.

Wellness Real Estate: Eco-design is very much in demand, especially by Millennials, for private houses. In addition, touristic and public buildings are now more sustainable and take into consideration the wellness of those who will inhabit them. A very recent good example is a 100% eco-sustainable public kindergarten in Guastalla by Cuccinella.

Beauty: Less invasive surgical solutions for face and body are still very much in demand to help match stereotypical beauty features along with complementary solutions, such as supplements and special beauty foods specifically conceived to have anti-aging remodeling benefits.

Fitness: Now more frequently connected to the medical world in order to offer programs that empower the body without compromising its balance and vital organs. Almost 2/3 of the population is actively concerned about physical well-being and practice some sport activity.

Nutrition: A key topic more than ever this year in Italy, thanks to the 2015 Expo, which has supported a message of healthy balanced nutrition very much discussed in the digital as well as the conventional media. "EAT WELL, INVEST IN YOUR HEALTH" has been the motto of the recent national campaign by the Italian Ministry of Health. It is an important response to the very dramatic phenomenon of growing childhood obesity due to processed food taking the place of the home-cooking that was common for the past generations, and to the lack of diet and wellness education.

3. How would you describe the state of workplace wellness in your country?

More and more companies are developing projects and activities to support the wellbeing of their workers, offering organic food, medical consultation, fitness facilities, and cultural and special programs to educate on how to live better. In particular, Technogym, a world-renowned Italian Company, has created and is promoting specific wellness programs for companies, supporting a very important message: Investing in Wellness is the best route to increasing the company's productivity.

In Davines/[comfort zone], we opened a Longevity Bar which serves organic food. We also offer mindfulness sessions, and have a very special project led by a philosopher to favour a harmonious productive environment so that work can contribute to the building of a satisfying life project.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Major investments have been done in specific regions such as Trentino-Altoadige, Lombardia, Tuscany, Veneto and Emilia Romagna to support the relaunch of ancient traditional thermal spas as well as to making hotels more competitive and appealing to both domestic and international clients searching for a quality regenerating time.

5. Whose responsibility is it to create a well world?

Creating a well world is everyone's responsibility, yet the more we have cultural, material or political means at our disposal, the more we have the duty to keep us in balance and to care for the people and the environment around us, and for the next generations. This is a duty but also a very important creative and "binding" possibility: we should remember it every day when we wake up and plan our working, family, and social day. We can truly improve the quality of our life as well as influencing others, by leading by example and by sharing positive, wellness-oriented thoughts, habits, projects and even very difficult challenges to stimulate intelligent solutions. Companies, schools, associations can indeed facilitate these processes, and social media can support this in a fantastic way, communicating and diffusing positive inspirational messages.

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SKIN SCIENCE SOUL

EUROPE: SPAIN

1. What is currently making news in your country when it comes to wellness or wellbeing?

The economic crisis has had a negative impact in the wellness industry these past years. Newly opened spas were shut down; new projects were on hold until further notice, etc. Besides this non attractive scenario for the industry, the spa and wellness sectors have found other ways to remain on the edge becoming more affordable and popular. There is an increase in the number of new opened fitness centers and low cost spas with a fix price; also activities like mindfulness or coaching are becoming more popular to try to find a balance in a more hectic life.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Due the economic recession the spas developments were stopped for the past years, this market is slowly growing but not major developments are occurring besides some new facilities in big hotel companies.

Wellness Tourism: Spain ranks the 6th position in the European ranking of the top 10 most visited countries for Wellness Tourism. The Wellness tourism in Spain by 2017 will grow at a rate of 6.2 % annually, more than double that the current leaders in Europe (Germany and France).

Wellness Living Communities/Real Estate: Although this is not a trend in Spain, at Sha Wellness Clinic we believe in the importance of a healthy life style and we are developing a wellness residence area close to our clinic where the residences 'owners could enjoy all the facilities and services of the clinic and benefit from a healthy cuisine on a daily basis as they were staying at the hotel.

Beauty: Spain ranks the 6th position worldwide in beauty products' exportation (we export more beauty products than wine or olive oil).

Fitness: Fitness is becoming a must in the Spanish daily routines, from running to most specialized fitness centers were activities like cross fit and hitt training are very popular. Due the economic crisis of the past years there is a boom of affordable fitness centers that make this lifestyle more accessible to everyone. Also activities like mindfulness or yoga are becoming more popular as a need to balance body and mind.

Nutrition: Spanish are more aware of the importance of a healthy nutrition nowadays. The nutritional supplements sales have increased by a 25% last year but also we are more aware of the importance of eating organic food as well as the way of cooking and hours when some food must be taken. The intake of super food is also booming in Spain like rest of the world.

3. How would you describe the state of workplace wellness in your country?

Although wellness programs at a workplace are linked to greater productivity, less absenteeism, and a reduction of long-term health care costs, this is not yet a trend in Spain besides big companies where you can find fitness centers within the building or agreements with third party companies; as well as dedicated areas for wellness with nap corners, mindfulness or meditation activities. In those workplaces where meals are provided the companies are more aware of the importance of a healthy diet, including healthy dishes for the employees with non-gluten options, non-lactose, sugar free, low carbs, etc..

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The investment in the spa and wellness developments in Spain has been virtually paralyzed in recent years due to the economic recession. The forecast for the upcoming years is promising at the same time that the economic recovery is occurring in the country. Major investments are planned for large hotel companies in Spanish cities which will develop as well as best spas facilities with a more holistic and wellness approach.

5. Whose responsibility is it to create a well world?

The responsibility to create a well world is part of each person who needs to be aware of the importance of a healthy lifestyle in a healthy world. Governments must start to think in investing in wellness programs as a way to decrease the long-term health costs. Life expectancy is increasing which will mean higher costs in public health so it is essential to invest in wellness preventive programs to reach the third age in a better overall health.

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EUROPE: SPAIN

1. What is currently making news in your country when it comes to wellness or wellbeing?

Nutricosmetics, and genetic based therapies are currently making news. We have to mention, that Spain is a very health conscious country, with a strong base on the miraculous Mediterranean diet and physical activity, plus the bath heritage from ancient Arabic times. As well, Going to the “physio” (physiotherapy), has been a normal activity to maintain health despite heavy physical activity and/or stress. For years, aesthetic centers maintenance on regular basis has been considered a must for a long time when thinking of keeping a healthy skin.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Spas are a must have these days for any 4-5 star hotel built in the country. We see a constant and sustained growth.

Wellness Tourism: Spain has been consistently growing on this kind of tourism, solid recovery from recession has been evident and according to Euromonitor International this trend will only keep on growing.

Wellness Living Communities/Real Estate: Starting to explode as a wellness living community concept in real state, particularly in high end developments, as fitness and health are deeply rooted in the psyche of the Spanish population.

Beauty: Paying a visit to the aesthetician at aesthetic centers to maintain skin health and beauty has been part of the Spanish practices for ages, now we see a higher penetration of medical aesthetic centers and clients looking for these services instead of a regular aesthetic treatment.

Fitness: As commented previously fitness is deeply important for Spanish people, running, cycling, walking and tennis being widely practiced for the general population. Especially outdoors sports are very popular and are accessible to the majority of the population. Fitness wearables of course and apps are not left behind.

Nutrition: Besides the Mediterranean diet that is naturally practiced, Nutricosmetics are very present and Macroantioxidants® are going to be next big thing in nutrition. Sugar-free, lactose-free, gluten-free, fat-free, additives-free are extremely popular as well, pushing manufacturers to create healthier varieties of their products.

3. How would you describe the state of workplace wellness in your country?

It's definitely getting stronger with some representations of international associations dedicated to it like SIY (Search Inside Yourself), Delivering Happiness & Coca Cola's Institute of Happiness, with specific Spain dedicated chapters and Spanish efforts to grow in the corporate world. Interesting to mention that number 1 selling health app is "Mindfulness App"

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

According to the "The Travel and Tourism Competitiveness Report" from the World Economic Forum (WEF) Spain is considered the most competitive destination in the world among 141 countries.

And according to the Global Spa and Wellness Summit (GSWS) in an study conducted by SRI International, the Spanish Market holds the 6th position in the European wellness tourism ranking with 9.9 million annual wellness trips in 2014. This is a clear reflect of the Spa & Wellness investment and promotion is doing for the country.

The challenges now are to increase the average expense of visitors in wellness travel.

5. Whose responsibility is it to create a well world?

Everyone's!

Each and every one of us has the responsibility and the capacity to create a well world, starting with yourself and your closest, and extending further.

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Natura Bissé
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EUROPE: SWITZERLAND

1. What is currently making news in your country when it comes to wellness or wellbeing?

Alternative Medicine Recognition

The Swiss government during a six-year trial period from 2012-2017 currently recognizes homeopathy, holistic medicine, herbal medicine, neural therapy and traditional Chinese medicine. These treatments are covered by basic compulsory insurance until 2017, provided a certified medical professional administers them. Ayurveda and European traditional medicine, as well as homeopathy and traditional Chinese medicine, have been approved for a national diploma examination. Currently these treatments are covered by a supplementary insurance scheme (an additional insurance policy that many Swiss hold to cover costs of complementary and alternative health treatments) if administered by a practitioner who is not a certified medical professional. As this is relatively new, not all insurers recognize these medicine systems however it is a breakthrough for the health and wellness industry of Switzerland.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: The Swiss hospitality industry is giving greater focus on spa management studies as recognition to the importance of this growing sector of business.

Wellness Tourism: Wellness tourism continues to strengthen despite the fact that Swiss tourism has showed a decline due to the strength of the Swiss franc.

Wellness Living Communities/Real Estate: Hiking, skiing, biking and living the outdoors are the norm engrained within the Swiss lifestyle, which is now giving rise to a new culture of spa & wellness users and most communities have a spa within reach.

Beauty: The export growth for Swiss Beauty products is primarily due to China's gaining purchasing power (reflected in the desire for premium quality) and its free trade agreements with Switzerland.

Fitness: The percentage of Swiss fulfilling the national recommendations concerning physical activity during leisure time has increased from 62% to 72% within the last 10 years (this increase applies to all age groups).

Nutrition: The Swiss are accustomed to seeking and delivering quality and this is reflected in the increasing demand for locally grown organic foods despite their higher costs in comparison.

3. How would you describe the state of workplace wellness in your country?

Swiss Wellness Initiatives in the Workplace

- **Friendly Work Space Certificate**

A tool applied in Switzerland to promote health in the workplace is the “Friendly Work Space” certification, introduced in 2009. The quality label is awarded to companies implementing health promotion as an executive responsibility and incorporating it as a part of their managerial strategy. Presently, only 31 Swiss companies have received this certification. However, thanks to the participation of larger players such as Nestlé and Swiss Post, over 100’000 people now benefit from a healthier workplace.

- **SWiNG Project**

The SWiNG project was established by Health Promotion Switzerland and Swiss Insurance Association to evaluate the impact of health promotion initiatives and activities. The SWiNG study comprised of 8 large Swiss companies, with a total of 5’000 workers. The study found that a staff member suffering from stress could cost a company corporate losses of 8000 chf.- per year.

A 10% increase in efficiency as well as fewer absent days came as a result of a positive balance between resources in the workplace (such as support from colleagues and encouragement from management) and sources of stress (conflict, noise, time pressure)

- **Wellness Initiatives in the Workplace Awards**

The Swiss section of the European Association for Health Promotion (AEPS) awards an annual prize of 25,000 CHF.- to enterprises that put emphasis on improving working conditions. Examples of winning activities have included, prevention of back problems among staff members, burnout prevention for workers above 50 years of age and alcohol awareness programs.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

In 2015 Switzerland has focused on investing in the following areas of health tourism: post-surgery rehabilitation, treatment of stress, beauty, preventive health care and active recuperation.

5. Whose responsibility is it to create a well world?

Each of us, and all of us are responsible in creating a well world. Many of us have good intentions on how we want to impact the world we live in, however we sometimes struggle with being true to this desire. Though we are better informed today on what creates a well world, the challenge is how to change our habits and mindset to fit with our newfound knowledge.

The practice of living in consciousness is necessary in transforming us to live in harmony with all that exists. A new consciousness and awareness is spreading causing us to realize our oneness with each other, nature and all creation. In creating a well world, it is vital that we see ourselves as a part of all creation rather than individuals in it.

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EUROPE: UNITED KINGDOM

1. What is currently making news in your country when it comes to wellness or wellbeing?

This year mindfulness has become an important topic of conversation in the UK with many new practitioners and classes emerging. This movement has helped highlight the importance of taking time out to enjoy simple pleasures, which includes feeling less guilty about spending time going to a spa and having stress relieving treatments.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Spas are becoming more accessible and catering to a wider audience.

Wellness Tourism: More targeted to specific concerns rather than overall wellness. New wellness retreats are opening.

Wellness Living Communities/Real Estate: Hasn't really made a mark in the UK yet.

Beauty: Organic beauty is fast becoming as effective as cosmeceutical lines. The consumer is much savvier with regards to what ingredients are contained in their products; and the origin of these ingredients.

Fitness: Shorter workouts or HIIT training for example, are now considered beneficial to your health.

Nutrition: The introduction of raw food menus into many spas; juicing is very much on the rise in the UK.

3. How would you describe the state of workplace wellness in your country?

Awareness is steadily growing but as a nation continue to work long hours and with the growth of technology, it's increasingly difficult to switch off out of hours. It seems that many companies provide wellness facilities in the form of group fitness, social experiences but the expectation to work long and hard is still there.

VOYA will be moving into new workplace facilities in 2016 to support the ongoing growth of the brand. We have launched a staff questionnaire asking individual team members what would improve their working environment, and this feedback is to be considered before the interior design and ergonomics is fully finalised. It was important VOYA as a company to listen to individuals and use this feedback in a structural way, as feeling well means something different to all of us.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

More companies are investing, upgrading or adding to spa/wellness facilities. The concept of wellness is only just emerging in the UK market. Awareness of the benefits of wellbeing are on the increase and I believe we will see more investment in 2016.

5. Whose responsibility is it to create a well world?

It's my responsibility. We all need to spend more time looking after our own wellbeing and looking at what we can do to increase the wellbeing of others. Imagine the difference in the world if we all spent 30mins every day on wellbeing? The possibilities are endless.

VOYA will be launching 2 new treatments in 2016 with wellbeing at the heart of both of them. Each treatment will have a taster version which will be perfect for lunch time stress busing breaks.

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VOYA

EUROPE: UNITED KINGDOM

1. What is currently making news in your country when it comes to wellness or wellbeing?

In the UK wellness practices such as mindfulness are becoming increasingly popular. Studies highlight how they are proven to help people cope with the stresses of everyday life. Eating natural and 'clean' foods is high on the news agenda with bloggers like Deliciously Ella gaining huge traction. People are taking more of an inside out view on their beauty regime and are becoming more conscious about what they put on their skin. Overall there is a growing appetite for products that help people achieve a better, happier way of life.

Source: Spafinder Wellness 365, 2014 Trends Report, Top 10 Global Spa and Wellness Trends Forecast

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Research shows customers visiting spas expect immediate results and personalised treatments. At Aromatherapy Associates, our expert therapists take the time to understand the individual needs of the customer and develop bespoke treatments that deliver triple benefits on the mind, body and skin.

Wellness: It is rewarding to watch trends in technology, beauty and fitness shape our overall wellbeing in a positive way.

Tourism: The UK may not be famous for its weather, but there are lots of wonderful opportunities for tourists to get outdoors and embrace our beautiful landscapes. For example, in London, tourists are encouraged to take advantage of the Mayor of London's Cycle Hire Scheme and London has a wealth of beautiful parks to discover on foot – in fact almost half (47%)* of the capital is green space. Across the UK, there are an array of outdoor activities that boost wellbeing, from stunning walking routes in the Lake District to kayaking in Wales and nature and wildlife tours in the Scottish Highlands.

*Source: Independent

Wellness Living Communities/Real Estate: think 'Garden Cities' – those with more green spaces – offer a healthier, more prosperous and safer environment. Replacing

concrete high-rises with energy-efficient buildings and car-free zones means cleaner air. Bicester in Oxfordshire, Northstowe in Cambridgeshire and Ebbsfleet in Kent are three cities benefiting from the Government's Scheme to boost Garden Cities.

Beauty: More people are adopting a holistic approach to skin care and beauty brands are working on formulas that boost the skin's natural regeneration processes and provide preventative and curative treatment against 'skin neuroageing'. Ageing of nerve cells – neurons – directly affects the communication between nerves and cells like fibroblasts, triggering a decrease in collagen and elastin synthesis. The latest new skincare formulas strive to improve cell communication between nerve endings and fibroblasts, promoting 'fibroageing'.

Fitness: It's hard to fit exercise into our hectic lives but rather than spending hours in the gym, more people are now embracing high-intensity workouts first thing in the morning. I think the first step is to make an effort to walk and stand up more. There is now enormous evidence that simply standing makes huge differences to your health. It is estimated that being on your feet for just three hours a day can extend your life by two years!

Source: WHO

Nutrition: The latest report from the World Health Organisation projects that almost three-quarters of men and two-thirds of women in the UK will be overweight in 15 years. There is no one way to tackle the epidemic, but I personally believe there must be more done to make healthy food affordable, fewer sugars and fats in processed food and clearer nutritional labelling. Educating today's generation so they can make better food choices is essential.

3. How would you describe the state of workplace wellness in your country?

We live in a stressed-out world and there is clear evidence that work-related stressors have a negative impact on both physical and mental wellbeing. We live in a connected world, which means many people never switch off and the working day is no longer 9-5. But setting work-life boundaries is crucial to ensure work related issues don't dominate outside work.

Source: Forbes

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

We are seeing more traditional retail brands entering the spa industry. In the case of Aromatherapy Associates, in order to expand the business, the spa and retail elements of the company work in harmony to increase brand awareness. In today's world, consumers are savvier and looking for well-known, trusted brands, which are available to purchase across different channels. Additional brand visibility enhances trial and this in turn recruits new customers, drives loyalty and aids the growth of the spa business and Aromatherapy Associates' treatments.

5. Whose responsibility is it to create a well world?

I think that everybody – from individuals to corporations and the government – has a role to play. If everyone strives to make a positive difference to the health and wellbeing of their own lives, and to those around them, it will generate a snow ball effect of wellbeing, paying it forward and impacting positively on their communities, our nation and ultimately the world.

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NORTH AMERICA: BARBADOS

1. What is currently making news in your country when it comes to wellness or wellbeing?

Barbados traditionally has had a well-developed and mature tourism product. However, with the raise of other tourist destinations competing for the same market the country has been forced to diversify its tourism product. The health and wellness sector has therefore emerged as a key priority area for growth within Barbados. Trending and news making topics within the wellness industry in Barbados include; the advancements being made in the areas of training and certification, standards development and the creation of products for the health and wellness sector through the use of indigenous products.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas, Wellness Tourism, Beauty, Fitness and Nutrition: We now offer, through the PBHC School, international training and certification in these areas, which will enable growth for Wellness Tourism.

Wellness Living Communities/Real Estate: Efforts have been made by private sector individuals/firms to potentially foster health and wellness retreats (e.g. Santoshia Barbados) but there is a need for greater level of effort to be made in terms of marketing and promotion to work towards the formulation of a marketing strategy to support such an endeavor.

3. How would you describe the state of workplace wellness in your country?

Barbados has made significant strides towards the creation of wellness environment within the workplace. The recent enactment of the Safety and Health at Work (SHAW) Act speaks to one of the critical steps which have been taken in this regard. While this Act has been formally enacted into law and seeks to ensure the safety and health of employers at work a lot more still remains to be done as it pertains to wellness within the workplace. Although, some organizations have sought to foster and promote a wellness lifestyle within the workplace through the incorporation of fitness and wellness centers within their facilities greater efforts need to be made at the national level. If Barbados is to fully adopt a wellness culture within the workplace, there needs to be greater focus at the policy level towards the creation of

a framework which will drive government and non-governmental organizations to support such an initiative.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

There has been an overwhelming positive approach to investments in the spa and wellness sector in Barbados. In 2015 alone, one of the country's leading health and wellness training institutions (PBHC School) was a recipient of an \$800,000.00 BBD grant through the Inter-American Development Bank's Competency Base Training Fund. This grant will allow for the training and certification of sixty (60) spa practitioners in their Level 3 CVQ in Massage Therapy and their ITEC Level 3 designation in either Sports Therapy, Reflexology or Aromatherapy. This grant fund which forms part of the IABD "*Skills for the Future Program*" is the single largest training grant which has been provided to any Caribbean country in the health and wellness sector. The award of this training grant to the health and wellness sector under the competitive project submission process and at this juncture within the country's economic state, clearly demonstrates the positive attitude of the government towards investments in the health and wellness sector.

Additionally, the Technical Vocational and Education Training (TVET) Council of Barbados under its Employment Training Fund (ETF) has also been a major source of grant funding investment to the spa and wellness industry. The Barbados Coalition of Service Industries Inc. has been a recipient of such funding. In 2015 the fund allocated over \$50,000.00 BDS towards the skills upgrading of spa technicians who had been working in the industry for two years or more but lack the formal training and certification to render them professionally competent within this sector. These investments speak largely, to the positive attitude of our government towards the spa and wellness sector in Barbados.

5. Whose responsibility is it to create a well world?

Together, all facets of society have an important role and responsibility to play in the creation of a well world. However, it is our governments that will play a leading role in this regard, as they are largely responsible for creating the policy framework and the enabling environment to support such initiative. Alternately, key support and stakeholder groups also have an important role to play in lobbying and advocating for the creation of a well world. Such support groups are critical in ensuring that the most accurate information is effectively disseminated to key interest groups and in mobilizing the general populous in the creation of a well world. Each individual

citizen also has a responsibility to play in helping to foster a wellness environment within their country.

SUBMITTED BY:

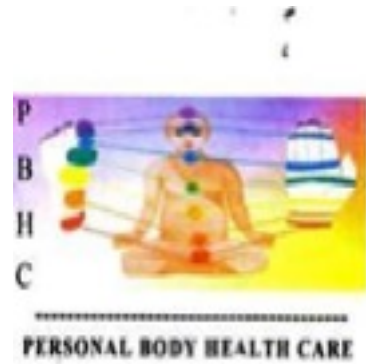
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NORTH AMERICA: BARBADOS

Barbados has an established tourism industry and is a leading Caribbean destination for travel. The hotel spectra include a range of accommodations, including a number of 4 and 5 star hotels. The island offers numerous excellent restaurants and attractions. Over 67% of visitors stay for between 4-14 days, most commonly for 8-14 days, allowing plenty of time to use such attractions and to engage in wellness/spa treatments.

1. What is currently making news in your country when it comes to wellness or wellbeing?

Barbados has long been a destination choice for those wishing to relax .. the standard image portrayed is sun, sea, sand etc. For the vast majority of tourists they chose Barbados to relax and enjoy themselves. As the spa industry globally has expanded, so have the expectations, so most people booking an even moderate hotel expect spa services. The development of spas within the hotel industry has been huge over the last decade, mostly of hotel based spas.

Medical tourism has also been developed on the island – most significantly by Barbados Fertility Centre where over 85% of patients treated, travel specifically for medical care. There has also been development of axillary medical services for example of Sils Dialysis which treats local patients but also facilitates patients on holiday who need dialysis, thus allowing Barbados to be a destination option for a holiday or cruise, for a patient with renal disease.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: All of the top hotels in Barbados have onsite spa facilities to meet their visitor's demands. The range of treatment offering has developed considerably and clients can chose from a single treatment to day plans.

Wellness Tourism: The concept that holidays incorporate wellness such as spa, fitness and healthy eating choices - is increasing. However, the idea that packages / holiday retreats specifically grouping for example yoga or mind body as the sole or primary reason for travel is not that developed. Barbados Fertility Centre does focus on incorporating stress reduction and treatments such as acupuncture and

reflexology alongside traditional IVF and in some cases this may be why a patient chooses Barbados.

Wellness Living Communities/Real Estate: Not currently developed.

Beauty: Yes of services typically linked with spas.

Fitness: Gyms and fitness options have expanded on the island. Certainly hotel gyms are common, and some offer a very good range of services way beyond what historically was the one treadmill and bike in the corner! These attract local membership and often offer classes or personal training within the facility.

There have also been significant developments in the area of sports and fitness with a number of events like 'run Barbados – international marathon and 10K' or the "open water festival – which includes a variety of water based competitions". Sports tourism for football, tennis, hockey and surfing has also developed considerably over the years.

Nutrition: Undoubtedly people are more conscious of healthy eating and its importance to wellbeing. This has influenced our many fantastic restaurants to include choices that follow current healthy eating trends.

3. How would you describe the state of workplace wellness in your country?

Local awareness of the importance of health and wellness is present with a number of entities endorsing corporate fitness programs. This can vary from simple after work employee fitness sessions in the car park (given the lovely climate in Barbados) to more formal gym membership.

There is also support for preventative wellness, with some corporate entities offering health insurance which does cover basic preventative health assessments.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Within the established industry the attitude to development and investing in spa services has been good as it is recognized that it is expected!

Barbados offers an established tourism platform and has in place the Barbados tourism investment division to assist investors considering Barbados as a destination. The Tourism Development Act aims to provide taxation incentives to potential developers who add/improve tourism products including hotels and attractions.

5. Whose responsibility is it to create a well world?

The ultimate responsibility lies with the individual who makes life choices but it is up to the industry to make this easy and attractive!

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NORTH AMERICA: CANADA

1. What is currently making news in your country when it comes to wellness or wellbeing?

The Canadian spa and wellness industry continues to flourish with spa visits making up a significant portion of the \$81.9 billion dollar Canadian tourism industry, with an estimated 14.1 million visits to Canadian spas in 2005 alone. With a significant lack of data due to an absence of annual industry reports, the Canadian spa market's growth and development has been poorly documented since 2006. The last formal published estimate stated that Canada has approximately 2,300 spa businesses nationwide and the industry is growing at a significant rate of 17% per year.

While the number of spa visits and new spas opening in Canada continues to grow, it is the new demographic of male patrons that has everyone talking. Revolutionizing the spa experience, male guests are inspiring new treatment ideas, services, marketing techniques and more. This growing clientele continues to inspire the evolution of the Canadian spa market, with more and more "just for men" locations opening across the country.

The male spa-goer is interested in overall wellness beyond the emotional response that female clientele often associate with relaxation. This extends to physical wellness, activity, rehabilitation and educated wellness decisions in the future. The male client is looking to be informed and an active participant in his wellness journey, trusting the expertise and recommendations of his practitioner and caretaker.

Central Ontario is a primary region in Canada that has embraced this modern man, with a large number of upscale barbers, spas and nail salons opening to service this exclusive clientele. The trend continues to spread across the country, with a variety of large spas and wellness centers offering "men's packages." Major wellness travel destinations in Canada such as Jasper and Banff in the Rockies, as well as Whistler and the coastal Maritimes have incorporated men's services in their major spas. Understanding the specific needs of this market, including different skin types, grooming techniques and maintenance, Canadian spas are adjusting their products and practices to cater to the growing male market. The inclusion of male clients at day spas and wellness centers opens up a new retail revenue source within the market. Retail opportunities for male specific grooming products is booming in Canada, with more men purchasing products based on facts and the results they experienced when receiving treatments. Building long term trust and return clientele is paramount with the male market.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: More and more Canadian spas are incorporating traditional or ancient practices from other cultures around the globe, for example hammams, which is a crucial development for our national spa growth in the future.

Wellness Tourism: The development of spas and wellness facilities in Canada offering treatments that utilize our country's diverse landscape, including natural salts and mountain hot springs, continues to build our wellness tourism market annually.

Wellness Living Communities/Real Estate: As Canadians embrace overall wellness and active living in their home and work lives, this extends into other elements of their life including wellness centered community building and real estate development.

Beauty: Canada is a leader in natural and ethically sourced beauty products, and our companies continue to develop innovative new products that support our environment for the future.

Fitness: A major beneficial development is the increase in Canadian companies incorporating a fitness element or weekly regime into their workplace wellness plan.

Nutrition: The continued advances in organically produced foods in Canada are a paramount development in improving the health and wellness of our country.

3. How would you describe the state of workplace wellness in your country?

Workplace wellness is a developing concept in Canada and is expected to continue growing significantly in the coming years. Understanding that health and wellness programs within the workplace improve productivity and the overall structure of the company is becoming more apparent to large scale corporations. With increased research and a growing focus on developing programs that facilitate healthy living, overall physical and mental wellbeing are becoming an investment element in a number of companies nationwide. The cost to the Canadian economy from workplace stress, depression and mental illness is 35 million lost workdays and an estimated \$35 billion in lost productivity annually. It is beneficial to corporations to be mindful of wellness and invest both financially and physically in programs that will ensure longevity and balance within their company. A large number of companies are incorporating a combination of dietary and physical activities as a way to moderate the work day.

An example of workplace wellness in action is the Williamson Group from Brantford Ontario. The company began by promoting dietary wellness in 2005 through Fibre Friday, paying for a tray of fruits and vegetables to be served to employees once a week. In the following years, they built on this program with a walking campaign encouraging staff to challenge one another to walk-a-thons. Regular Health Risk Assessments (HRA) reported a significant drop in high risk employee health, showing a drop to as low as 11%. As more reports on the benefits and results of corporate wellness programs become available, the understanding of wellness in the workplace continues to grow in Canada.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

With the absence of an annual industry report on the spa/wellness market in Canada, the industry growth is being measured on previous data. In 2006, the Canadian Spa Sector Profile was published and recorded 2,300 locations in Canada and growing.

Continued investment in the wellness industry within Canada continues to grow, with a number of new spas opening each year across the country. Not only are the number of spas increasing, the investment in quality and wellness education is growing as well. The Spa Industry Association of Canada (SIAC) announced that 28 spas achieved the Quality Assurance Approved status in 2014. This is the only national program of its kind in Canada, and evaluates the safety, hygiene and best business practices, clearly indicating a continued investment in wellness within Canada. Businesses are becoming more aware of the need to unite education and wellness into their spa mentality, and that the two work in unison. In 2014, the Wellness Institute released The Global Spa & Wellness Economy Monitor report. A survey within this report showed that 91% of those businesses already responding to the wellness movement have seen an increase in revenues between 5-20%, with the belief that the concept of wellness is considered extremely important to the future of spa.

5. Whose responsibility is it to create a well world?

This is a shared responsibility by all people in our global community. Developing a healthy and active lifestyle on an individual basis through physical activity and ethically sourced foods will initiate the first steps in a well world. Mindful living develops personal wellness and this in turn will generate a well world. The further development of spas and wellness centers in Canada and throughout the rest of the world continues to support the collective understanding of living well in mind and body. With the launch of new locations and the continued innovation and creation of wellness programs helps to educate our community about the longevity and benefits of developing a well world.

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NOEL ASMAR
UNIFORMS

NORTH AMERICA: CANADA

1. What is currently making news in your country when it comes to wellness or wellbeing?

- Clean and mindful eating, making better choices and reading labels.
- Emotional and mental wellbeing, with depression and anxiety at their highest reported levels the need for wellness outlets is a growing need.
- Unplugging yourself, the importance of an electronic detoxification

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: An important development in the Spa industry is employers realizing benefit to insurance coverage including holistic/massage and spa services to aid in mind and emotional balance, resulting in improved overall wellness, productivity and performance in the workplace.

Wellness Tourism: A significant development in the Wellness Tourism industry is the continuous growth of travelers seeking non medical solutions to improving health and wellbeing.

Wellness Living Communities/Real Estate: The implementation of wellness related programs and education (spa, holistic therapy, massage) to change the mindset or wellness/fitness within communities has been an essential development.

Beauty: Canadian consumers have had important development with their perspective on beauty products- now searching for products that are Canadian made, Paraben free, organic, ethically derived- to enhance radiant youthful skin.

Nutrition: An important development with Canadian Nutrition is that Canadians are educating themselves on clean eating and being mindful with food choices.

Fitness: A significant development with Canadian fitness is the movement to be more active and the variety of outlets becoming available for Canadians in order to do so-tax credits, employee fitness programs, etc.

3. How would you describe the state of workplace wellness in your country?

I would describe the state of workplace wellness in Canada as WORK IN PROGRESS. Although the government has implemented campaigns to assist in changing the mindset of its citizens, employers need to realize the emotional and mental fatigue paced challenging environments play on individuals. Implementing wellness and fitness programs within the workplace will increase productivity and overall revenue. I believe of the government should provide incentives to Spa's, as Spa's improve wellness putting less strain on the health system.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The general attitude toward investing in spa/wellness in Canada for 2015 is apprehension.

Examples:

- There is a struggle with competition in the Spa industry with relation to low end nail shops, as therapists open these shops out of their homes and behave like a cash operation.
- The struggle to compete with wages as there is a lack of support from Ontario Colleges for the Spa industry. (I.E) College encourage therapists to open businesses out of their homes
- Apprehension when opening a spa as you need to ensure you have the correct demographic/income to support a spa within the community

5. Whose responsibility is it to create a well world?

Each and every individual is responsible for their personal contribution to wellness to achieve a well world.

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The logo for Euphoria wellness spa features the word "Euphoria" in a large, elegant, cursive script. Below it, the words "wellness spa" are written in a smaller, clean, sans-serif font.

NORTH AMERICA: CANADA

1. What is currently making news in your country when it comes to wellness or wellbeing?

The concept of wellness has permeated every facet of Canadian society as educated baby boomers seek greater health, wellness and longevity. Consumers have started making conscious choices that have a direct influence on all their buying decisions. Wellness is no longer a buzzword, it's becoming a way of life as Canadians are choosing GMO free food, fair trade products, ethical travel options, as well as environmentally friendly homes and vehicles and everything in between.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: The New Spa Wellness Culture Movement is bringing the industry back to source. There is a consumer led invitation for the industry to simplify, focus on sustainability and engaging social environments that provide greater emotional health and wellness.

Wellness Tourism: The current trend in wellness tourism reveals that affluent baby boomers are choosing high-end vacations in natural settings that offer a health or wellness advantage over the mundane beach vacation.

Wellness Living Communities: Wellness living communities are no longer a fringe movement and have gained legitimacy as well as great interest and enthusiasm among the mainstream population.

Real Estate: Sustainability is quickly becoming a priority in the Real Estate Industry. Once again, educated consumers are seeing the value of an eco-friendly and healthy home and they are pushing the industry to adapt to their new, more conscious needs.

Nutrition: Consumers are increasingly concerned with how their food is being produced and are choosing locally organically grown products.

Fitness: There is a current dichotomy in the fitness industry: On one end of the spectrum we are seeing the emergence of high-end training facilities with sophisticated equipment and polished urban design and at the other end of the spectrum, we have also noticed that there is a growing segment of the population that is turning to nature and low tech fitness practices such as Earthing for their daily fitness regimen.

3. How would you describe the state of workplace wellness in your country?

Workplace wellness is a very vast subject and it would be important to segment each workplace category in order to present a precise analysis of the situation. We would create 3 main segments: Private sector, public sector and a special category for small and medium sized businesses. It would be important to mention that workplace wellness is somewhat of a taboo in Canadian society. While our country boasts the best quality of life in the world, there is also great suffering, which is often suppressed and hidden.

Certain industries in the private sector are more conscious of the importance of a positive workplace environment and will offer meditation and stress management classes as well as healthy food options and yoga rooms. However small and medium sized businesses aren't able to provide the same level of benefits to their employees as they are often struggling to make ends meet.

The public sector is currently in crisis as they feel the crush of austerity measures that do not take into consideration the health and well being of its workers. The impact on society is vast and far-reaching. The disparity between these segments is creating a greater rift between the rich and the poor and the middle class is quickly disappearing.

There is also a breakdown of traditional work hours as technology has created greater connectivity which means that the 9-5 work structure has expanded to a 20h cycle in some cases. Work/Life balance is greatly challenged as we are now constantly available via our portable technology.

We see the fantastic opportunities presented to our industry to show leadership in each segment of workplace wellness.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Speculators are seeing the tremendous potential for the spa/wellness industry and we are seeing a surge in massive investments in the development of new projects all over the country. For example : Maalouf international has invested 240 million dollars in the La Rolland project, which is a four-season, indoor wellness

destination/complex with hotels, spas, water parks, fitness installations and restaurants located in a small mountain community, just one hour out of Montreal. (This is the third project of its kind that we have seen from Maalouf International.

5. Whose responsibility is it to create a well world?

We are all responsible for co-creating a well world.

Parents must love and be present for their children.

Schools need to teach children to be who they are, to connect with the earth, to be aware of the alignment of their body mind and spirit and to receive an education regarding the sacred connection between men and women.

Our health professionals must be open to new and ancient techniques that bring wellness and bridges need to be created between our doctors, nurses, doulas and other wise practitioners.

Our farms must honor the earth and produce healthy, organic food that nourishes our bodies.

Our businesses must embrace ethical and sustainable business practices that respect our natural resources and create abundance for all of us.

Women must learn to honour their power and gather in circles to support and take care of each other as they extend their service to the community.

Men must learn to collaborate more and compete less and use their great strength to build and not destroy.

We must all learn to care for each other and to realize that we are all equals regardless of our age, creed or colour.

Artists must realize that they are the creators and they must honour and nurture their creativity and allow it to shine in order to inspire others to do the same.

I believe there should be a Global Ministry of Wellness and we should work together to reimagine the structures of our societies with a focus on health, wellness, peace and social justice.

Every person who has the impulse to share their values and profound convictions about our collective wellness must speak up. Wellness must be within reach of every hand and should not be based solely in capitalistic terms. We have a social responsibility, as an industry, to make sure we create not only an individual wellness

experience, but a great collective one, as well. Let us open our doors wide and nurture our humanity in order to co-create a better world.

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NORTH AMERICA: GUATEMALA

1. What is currently making news in your country when it comes to wellness or wellbeing?

Guatemala it's really beginning to introduce into wellness compare to what countries like United States or Spain have been focused for a lot of years. Wellness right now is probably mentioned just for some Spas, Wellness clinics, Vacations or Gyms; but it's starting and that's a good sign. I can also mention that technology is making news with sports like running, cycling or swimming.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Guatemala may have around 20-30 Spas, mostly near Guatemala City. Little Spas are being open every year.

Wellness Tourism: It's beginning to have the first results. Guatemala's Exporters Association has the leadership in this area and making big efforts to let the world know that Guatemala has the potential for medical and wellness tourism.

Wellness Living Communities/Real Estate: Not being developed.

Beauty: Beauty salons are all over the country. It's a very well developed business and very specialized for women treatments.

Fitness: This is also very well developed area. Private gyms and clubs are attended. Sports like running, swimming, cycling are new areas in fitness.

Nutrition: For the last three years Nutrition has been more important to Guatemalans, mostly in weight loss programs and fitness.

3. How would you describe the state of workplace wellness in your country?

This is also beginning in our country. Home Office and flexible schedule are some examples that we're starting to learn that some Companies are doing. Probably Call Centers are the type of business that are focusing a lot in workplace wellness.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Probably that big hotels that have been in Guatemala for a lot of years are starting to invest in developing their own Spas, their clients and tourists are constantly asking for wellness!

5. Whose responsibility is it to create a well world?

Everybody is responsibly. Tourists, clients, providers.

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NORTH AMERICA: JAMAICA

1. What is currently making news in your country when it comes to wellness or wellbeing?

In the country of Jamaica where Red Lane Spa and Sandals Resorts International is headquartered, I sit on a steering committee for The Ministry of Tourism as it relates to marketing and developing a thriving and profitable wellness tourism industry. The Jamaicans have invested considerable resources into market research to determine the viability of having Jamaica enter the world stage with countries like Costa Rica and Mexico that have successfully implemented wellness tourism. To this end the Ministry of Tourism has conducted extensive research internally and with consultants into the state and readiness of the hospitality and medical and educational sectors to support the wellness tourism industry. As with all matters of this size and scope, they are exploring a partnership between the private and public sectors (PPP) to give this concept the proper funding and educational support to be successful.

What is happening in Jamaica is taking place at various levels throughout many Caribbean Islands. Most countries are now looking to standardize therapist training, spa building guidelines and development of internal product developers to at least a country guideline, and where applicable to a regional set of agreed upon principles. To this end there have been regional meetings over the past several years to begin a dialogue about how to accomplish these goals. There is a Caribbean Spa Association that meets in Barbados and countries have begun to establish their own spa associations to address the unique situations of their respective countries.

To address the educational concerns of our spas specifically, Red Lane Spa has launched the Red Lane Institute, which is a training program that we have launched in partnership with Heart University. This will allow Red Lane to standardize the training of our therapists across the entire Caribbean. This partnership will also allow us to train any person to become a therapist to the level of approximately 600 hours. As we hope to build a strong wellness tourism sector for the region, we realize that on the spa end, we need to have therapists trained to international standards. Red Lane Institute is our response to this need.

We are also seeing an increase in non-massage services for our properties. In 2015 we have had a 33% increase in the number of facial services that we have provided and this has translated into a 35% increase in revenues from 2014, and we are seeing approximately a 17% increase in spa retail revenue, which is consistent with the increase in facial services offered.

We are seeing the same upward trajectory in our private fitness training, which has increased 300% in revenue from 2014. This is a function of the fact that we have

begun to actively promote these services on our website and at the resort level. We have also invested resources to ensure that all of our fitness providers are properly certified through AFAA, which has improved the quality of training and fitness at the property.

Overall we are seeing a 30% increase in revenues from 2014, and a similar increase in the number of services being performed at the property level. People are taking the time to spa at our properties. We can also attribute part of the jump in numbers to the fact that at our family focused resorts, we have launched a Teen/Tween Spa Concept called Ginger Lily, which has introduced a younger consumer to our spa services. So we are speaking to almost 100% of our guests at the properties. We have created a completely inclusive spa experience for our Resorts.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Spas are becoming more relevant to the overall guest experience in the Caribbean.

Wellness Tourism: Wellness Tourism is in its nascent stages, but will develop over the next two decades to compete at an international level.

Wellness Living Communities/Real Estate: As the wellness concept expands and is better developed in the Caribbean, this concept will expand as well.

Beauty: People are coming to the Caribbean looking for facial treatments that are formulated with indigenous ingredients from the various countries.

Fitness: Fitness has become big business in the Caribbean, and there is the expansion of private fitness centers and clubs, and this has caused hotels to up their fitness offerings and training of their team members.

Nutrition: We have had to modify our food offerings to reflect current trends in dining such as Gluten-Free, Vegan, Non-Dairy products; similarly, we have expanded our menus to include international cuisines such as Indian, Italian, Japanese all prepared by chefs from these regions of the world.

3. How would you describe the state of workplace wellness in your country?

Workplace wellness is still developing in the Caribbean. Staff cantinas serve food that is familiar to the local population but not always nutritionally balanced, and often devoid of variety if one is not a heavy meat eater. The region still has a ways to go in

terms of full implementation of a 5-day work week; oftentimes the team members and managers are working well over 50 hours a week. Overall, this is an area that can still be developed in the region.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

As I referenced earlier, spa and wellness are on the radar of most countries. Specifically for Red Lane, we have had significant investments over the past two years in the spa experience for our company. We will be launching a Red Lane branded skincare line in November 2015, which was a significant investment of company resources to develop the product, which was a two years process, as well as the development of the packaging and concept for the line. We have also invested in updating our physical spas to make them more in line with current design trends. We are also launching a new spa design concept at Sandals Royal Caribbean in November 2015, which will be replicated at Sandals Barbados and Sandals Ochi Beach Resort.

5. Whose responsibility is it to create a well world?

It is a collective responsibility of all of us living on this planet. John Donne aptly stated, "No man is an island unto himself." We are in this journey together to create a well physical, political, spiritual and financial world.

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NORTH AMERICA: MEXICO

1. What is currently making news in your country when it comes to wellness or wellbeing?

The biggest news for Mexico and Latin America is having the privilege of hosting the Global Wellness Summit in Mexico City. We hope there will be lots of press and publicity, the Ministry of Tourism, and the private investing sectors will realize that Mexico is a land of wonderful opportunities and rather than exporting bad news, we can export healing traditions and fabulous cultural and wellness experiences around the globe.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: For Mexico the future and evolution of the Spa Industry lies in the implementation of Wellness concepts.

Wellness Tourism: The Global Wellness Summit in Mexico will shift the perspective of a nation toward investing in the growth of Wellness Tourism

Wellness Living Communities/Real Estate: A Tsunami wave of Wellness is coming to Mexico providing a fertile ground for Wellness Communities to grow.

Beauty: Is the result of well-being that is manifested as true and vital health.

Fitness: and Nutrition are integral components of the 360 Wellness programs.

3. How would you describe the state of workplace wellness in your country?

Ministry of Health dictates the welfare and care of employees hired by big corporations. However, the real issue lies in the agricultural rural areas where working conditions are non-existing or minimal. The ideal scenario would be for corporations to cultivate a leading edge thinking that not only follows government regulations but also are willing to create workplace wellness in a grand scale and are willing to create programs and foundations to support those poor communities that

have no resources or education. The Mexican Government needs to raise the bar of well-being for a working nation.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Several Hotel Chains in Mexico are adopting the Wellness Rooms concept of a Healthy Hotel like AM Dreams Resorts, Palace Resorts, Grand Velas Resorts and Karisma Resorts. All have now restaurant menus that offer Gluten Free options.

5. Whose responsibility is it to create a well world?

Private initiatives and Government have the greatest opportunity to invest support and develop Wellness Concepts, however we as a human race have that responsibility by choosing and demanding wellness options for our everyday living, at our workplace and in our communities.

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NORTH AMERICA: MEXICO

1. What is currently making news in your country when it comes to wellness or wellbeing?

As an expat in Mexico since 2013, my perception is that wellness and wellbeing are not practiced by the majority of people. I see more a get well rather than be and stay well concept.

Instead of a challenge I see an opportunity for our Industry as we've got much to give to the population.

Mexico has beautiful and effective traditional medicine, wrongly set aside and I trust the Spa industry is reviving and supporting those traditions, to assist the prevention of illness on a natural and more organic way.

I've noticed an awakening...more and more involvement in sport activities, more awareness and demand on our industry services, at least the basic ones as massages. As well, more interest from the government to implement regulations for the wellness practitioner, setting guidelines and best practices, in order to protect the consumer and at the same time, the results given.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: I can see the industry leaders working closer to each other to help the industry grow, to settle in a responsible way. As more of the higher-end Resorts and Hotels set its interest on Mexico, a higher quality of spas will appear, improving the spas perception as well as increasing the qualifications expected from their staff.

Wellness Tourism: Mexico has a rich heritage from its natives. The knowledge they had somehow has been preserved on how to maintain health and will continue to expand to the wellness industry. I can see, how some of the currently small wellness center, may evolve to a more sophisticated concept to attract a more affluent tourism. I just hope it doesn't lose its essence! The government has created a new concept of Pueblos Mágicos – Magic Towns, where the main motive is to share the intact cultural heritage that those towns has to offer, including natural medicine.

Wellness Living Communities/Real Estate: We can see a few communities established around the country that offer such alternative, however is still in its development stage. Lots of potential and opportunity!

Beauty: A booming industry, Mexican women has always liked to look pretty.

Fitness: Great potential, mainly to start with young kids at schools to help and control weigh gain and fight against obesity.

Nutrition: Again, a big opportunity, the challenge is the well-established Mexican cuisine and finding alternatives that are healthier yet delicious.

In resume for all of them. Mexico is a rich country, with amazing welcoming people that provide top quality caring service, core of our industry. It's also rich in the resources, capable of producing and manufacturing top quality ingredients for cosmetics and linens. Capable of sharing the richness of its culture in a perfect and accessible location. Mexico has what it takes to be a leader in the wellness industry, it needs the right guidance.

3. How would you describe the state of workplace wellness in your country?

In diapers. Many international companies are bringing those programs into the country and has spread around. I consider like in any country, many of us spend more time at work than at home and having a healthy work environment, that also invest on keeping their team healthy is not only smart but profitable.

I've notice at our company, that we organized many wellness activities for the staff and only a few participate, we make small changes for healthy eating options and the staff complaints which tells us that we do need to train the staff and teach them and guide them. Many of us changed habits once we realize that it wasn't healthy, for some it may take more time to come to that decision.

I think, like in everything that is worth to achieve, we need to persist, even against majority sometimes, in a gentle way and with education - for me the key to change - and we will be able to slowly impact lives to live well. If we change one person's life, that person will create a ripple effect toward hers/his close circle of people. That is how we start!

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

I think in general, Mexican economy has improved, attracting international investment once again. The wellness industry is booming again in Mexico and hasn't reach its full potential yet, still has much to give and investors can see that. Hence a sample that the Global Wellness Summit is been held at Mexico City! This will also help to direct eyes to our wellness industry. Now is our turn to prove that this country has much to offer to the wellness segment.

In the specific area I live currently, the spas are center of attention on the Hotels/Resort of the area, with large facilities and menu offerings. The renovations of spas are constantly happening, attracting new markets and driving Hotels revenue. Many of the top incentive groups programs, based their programs on the Spa and it's offering; same is happening for many guests, when choosing a destination for their holiday, investing in the wellness industry has proven to be a smart business decision!

5. Whose responsibility is it to create a well world?

Each of us! I love the Gandhi phrase that says "Be the change you want to see in the world". We need to be the change and lead that change. This are exciting times for the wellness industry in Mexico!

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FOUR SEASONS
Hotels and Resorts

NORTH AMERICA: MEXICO

1. What is currently making news in your country when it comes to wellness or wellbeing?

In Mexico there is an increasing health consciousness among the mere spa-goers and the lovers of real spa experiences. With privileged geography, splendid weather, beautiful beaches, world class resorts, high quality services, warm personalized attention and luxury sanctuary-regions (as the Riviera Maya and Cancun, with the highest density in spa facilities per square foot in the Caribbean), the industry in Mexico has naturally evolve its offer in recent years -from the mere resting, beauty and felling-well experiences, to a huge variety of ceremonies focused in the body, mind and soul... journeys in search of a holistic accomplish of health, happiness and meaningful wellbeing.

This new perspective in wellness has facilitated Mexico's double-digit growth in the number of international tourists searching for luxury spa experiences in the last year (an increase of +7% in comparison to 2013). It's the fifth consecutive year of growth the country has experienced since the 2009 economic crisis!... Mexico is in the Top-5 wellness destinations for the luxury spa traveler in the world -an industry that creates thousands of jobs.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: There is an increasing number of facilities developing from spa and fitness practices to a health and wellness philosophy -one step further in the search of a holistic lifestyle.

Wellness Tourism: In the list of the Top-10 world destinations Mexico is a serious competitor in the medical and health tourism industry -one of the fast growing niches with international certifications.

Wellness Living Communities/Real Estate: The challenges are great in the creation of real holistic health communities. There is only a few residential developments in this matter -in the states of Guanajuato and Quintana Roo.

Beauty: Native pre-hispanic treatments, products and techniques to achieve health, physical beauty, sustainable wellbeing and happiness now joyfully combines with modern technology.

Fitness: The conscious need of having regular exercise to improve the personal health is a motivation to find time and exercise oneself in different manners: fitness, bicycling, running, swimming.

Nutrition: Considered as a key essential for gaining holistic wellbeing and longevity, diets and healthy nutrition are tools many spa-goers and hedonists try to happily dominate in their lives.

3. How would you describe the state of workplace wellness in your country?

It is a huge problem in the majority of workplaces, in which the stress is an ever present factor with only a few weak official and private policies to resolve it – exception made of several main companies in the country. It's a whole pending issue.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The spa and wellness culture is becoming a universal language. In Mexico the major hotel chains –in resort beach destinations and also inland– are constantly investing to have first class spa and fitness facilities, equipped with the best in technology to attract and satisfy their discerning customers. This can guarantee the success of the business. AMResorts, Starwood, One&Only, Rosewood and Four Seasons are a few examples.

5. Whose responsibility is it to create a well world?

More than 250 years ago the philosopher Immanuel Kant wrote about the necessity to convert the hospitality development (the tourism indeed) in a moral imperative. He sentenced: “The cosmopolitic right has to be limited to the conditions of a universal hospitality”.

It is a shared responsibility of private investors, governments, companies, spa connoisseurs, travelers, media, etcetera, to work consistently and ethically in the

creation of first level conditions -politics and policies- which permit us to create a Well World.

For me tourism is The Industry of Peace, with a global expansion that began only three decades ago. We must convert this actual third biggest industry in the world, in the first one.

In Mexico we have a lot of effective work to do in this matter.

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NORTH AMERICA: PUERTO RICO

1. What is currently making news in your country when it comes to wellness or wellbeing?

The Puerto Rican community lives a heavily consumeristic lifestyle and at times a fairly unbalanced mind set. To prove that you can research many top selling department stores and retailers worldwide such as Macy's, and Victoria secrets amongst many others, that have their flagship top selling, record breaking in sales in this wonderful island 100 miles wide by 33 miles tall. Having said that, there is a huge misconception as to what is wellness and wellbeing in general. Currently in Puerto Rico wellness is directly associated with exercise, and one thing that is trending amongst the different social classes are new workout modalities such as Xco Latin Workout by Jackie, Tabata functional interval training and the gym membership to the newest or best gym in town. There is a lot of news as well in new results oriented machines such as HydraFacial MD, Endermology and Lacer treatments to have a more youthful skin of to eliminate unwanted hair. Unfortunate the words Wellness & Wellbeing are associated with a big fat \$\$\$ sign...

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Knowledge is power and not knowing the real benefits behind spas just diminishes your chances to live better and be happier in life.

Wellness Tourism: Puerto Rico has a lot to offer when it comes to medicine, aesthetic procedures and lodging facilities... but we are still way behind other countries like Colombia that do full transformations in weeks.

Wellness Living Communities/Real Estate: The buildout of properties like the St Regis in Rio Grande, and the Ritz Reserve in Dorado, where they combine hotel and residential facilities I can attest that the quality of people and life is above the norm, but a high ticket to pay which is mostly attainable by millionaires.

Beauty: The Puertorrican community has always trusted beauty salons as their go to weekly fix and are now inclining to Med Lounges to maintaining that desired young soul in the outside.

Fitness: There is a place for every social economic class, so there are no excuses... from Planet Fitness to Liv Fitness Clubs in Puerto Rico there is a wide section to choose from.

Nutrition: There has been a large knowledge explosion as to the Nutrition sector which in part has mostly appealed to the awareness clause to prevent obesity and to live an overall energized and healthy life.

3. How would you describe the state of workplace wellness in your country?

The state of workplace wellness is nonexistent in small business industries due to a lack in resources to be able to price it accordingly. In the big corporations like P&G, Amgen Pharmaceuticals and L'Oréal Caribbean the scenario is a bit different... they have wellness programs in place for their staff that includes Gym facilities, in house Nutritionist and a work life balance promise to motivate their employees to strive more for their company. The government in my opinion needs to find solutions for small business owners to be able to provide with incentives the same quality of opportunities to their employees.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

There are two categories in the island that have been simultaneously growing the Spa / Wellness in Puerto Rico. The first one is mostly composed of aesthetic lounges, small med spas, beauty salons with 1 or 2 massage beds and a few urban spas that offer a fairly medical atmosphere with some decor that disguises the reality to fulfil a spa look. On the other hand there are the big Hotel Spas and in between those two categories lies YeloSpa San Juan. This past year beside our opening in San Juan on May 2014, there has been two other great additions which are the Ritz Reserve Spa in Dorado which is 45 min away from the Metropolitan area and the Vanderbilt Spa which recently opened 3 months ago. There is a lot of talk about a new Renaissance Spa right next to the Vanderbilt Hotel and a complete revamping of the spa at Hotel San Juan & Casino which was the former Waldorf Astoria until very recently it was bought.

5. Whose responsibility is it to create a well world?

It is my responsibility to create a well world. I can be a driving force to change one persons out look in life, and in term give that one person the tools and desire to pay it forward. It is why I love and live by the wellness industry as my one contribution to share health and wellness with as many people as I can. Lets stop making excuses

and lets get to work! In YeloSpa San Juan besides our massages, facials and naps... we offer Chiropractic, Nutrition, Medical Aesthetics and a Full Service Salo which was branded YeloDry Blo. Bar

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

Compassion. Research supports the precept that living a life of connection, meaning, equanimity, and compassion not only feels good but is associated with the prevention of inflammatory diseases, improvements in how we maintain our chromosomes to maintain the health of our cells, and immune system functionality to prevent and fight infection. It is also linked to longevity. Many organizations that already offer mindfulness training at the workplace are additionally offering compassion cultivation training to employees.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Any successful spa targeting Millennials must include comfortable social areas such as communal bathing as well as areas to eat and “hang out.”

Wellness Tourism: There are big shifts in the lodging industry - PricewaterhouseCoopers estimates that Airbnb received 155 million guest stays in 2014, nearly twenty-two percent more than Hilton Worldwide.

Wellness Living Communities/Real Estate: Most new luxury residential developments include a fitness and spa amenity in their project mix but, like the hotel industry twenty years ago, many don't know what “spa” is or how to offer it genuinely.

Beauty: Beauty-on-demand apps are gaining popularity for at-home services and it's a good idea to watch how Mink and Moda use 3D printers to digitalize makeup, creating products that are personalized and convenient.

Fitness: As an alternative to the traditional membership model, subscription services like Classpass - offering users unlimited monthly fitness and health classes - are not only providing a way for boutique studios and gyms to be discovered but are

actually creating the demand: Eighty-five percent of Classpass users are new to boutique fitness and sixty-five percent are new to fitness in general.

Nutrition: Chaga and mushroom coffees and teas are the new kombucha.

3. How would you describe the state of workplace wellness in your country?

Improving. Businesses are increasingly aware of the benefits of prevention. The latest survey on wellness programs from Fidelity Investments and the National Business Group on Health (NBGH) projects that employers will increase average spending per employee by 17% this year - even as Congress uses sequestration to make cuts to the Affordable Care Act's contribution to funding.

For some employers, the focus of wellness is shifting to include employee wellbeing and not just physical health. Employers are encouraging employees to use vacation time, providing tuition reimbursement, supporting community charity drives, and offering counseling on personal finances.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Positive. IHG's new brand Even and Starwood's new extended stay concept Element are both being rolled out and a recent trend analysis report released by the Tisch Center for Hospitality and Tourism states that capital expenditures within the U.S. lodging industry have placed enhanced fitness facilities in the top 3 areas of expenditure, geared toward Millennial travelers.

5. Whose responsibility is it to create a well world?

Individually and collectively, we're all in this together.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

In the US, a growing awareness of how environmental issues (rising temperatures, drought, acidic oceans, rising water levels, pollution and GMO's) is impacting our health and wellbeing is taking root.

On an industry level, we are seeing two different approaches to Anti Aging and Longevity. Cosmeceuticals, fillers and surgery are now commonplace and widely accepted. Guests seeking an experience in nature, a holistic approach. (Ayurveda, naturopathic medicine, hydrotherapy, organic fare, healing via food, cryotherapy, meditation and mindfulness) is also growing. We are a diverse culture...

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: The trend of merging brands/identities between cosmetics and spas.

Wellness Tourism: In the US, we still have much to learn from our European counterparts who have been investing in rehabilitative wellness via Thermal hydrotherapy programs for many years.

Wellness Living Communities/Real Estate: Country club fitness and spa amenities in affluent communities now incorporate physical therapy and medical services as well as farm to table and organic growing programs.

Beauty: A dichotomy: medical cosmetics are mainstreamed, clients are getting younger while interest in natural, organic and do it yourself medicinal aromatherapy continue to expand.

Fitness: Yoga has never had a greater following.

Nutrition: An ever growing awareness of the depleted vitality of food sources coupled with growing interest in organic, bio-dynamic foods, nutrition via the skin

and supplements.

3. How would you describe the state of workplace wellness in your country?

For a profession marketing 'wellness' we do a woeful job. The work environments of our leaders (Spa Directors,etc) are often cramped and without natural light. Associates work long hours and have little or no vacation or sick leave time. The majority of associates are officially 'part-time or on call' regardless of the number of hours they work . A common practice in corporate owned spas is to dole out the title 'Supervisor' to avoid paying overtime. A majority of spa associates must work another job or two to make ends meet.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

A viable investment examples? Profits in resort/hotel spas are now expected to match those of food and beverage. (30%)

Business transactions of interest: Montage Laguna Beach, Marilyn Monroe spas, Steiner.

5. Whose responsibility is it to create a well world?

We all share the same planet and eco-socio and political collaboration is imperative. A tall order! On a personal level, however, we have the freedom to create our own wellbeing. Working from the perspective of inside out, with an understanding that our inner environment is a reflection of our external environment, we can become the change we want to see.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

From FitBits to the Apple iWatch, health technology is currently a booming industry in the United States. Consumers are keeping track of their health through using wearable devices that allow them to build better daily habits. Companies are also encouraging employees to improve their overall well-being through digital wellness programs. At Pacific Hospitality Group, we encourage employees to join Virgin Pulse, which is an online platform that assists them in living a healthy lifestyle through tracking, personalization, education and rewards.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Guests are becoming more focused on wellness-related services than purely indulgent treatments.

Wellness Tourism: Consumers are more invested in maintaining their wellness routine while traveling, and the hotel industry is meeting this need through providing healthy food options, flexible meeting space and 24-hour fitness centers.

Wellness Living Communities/Real Estate: Communities focused on wellness are gaining popularity at universities in the U.S., and these residential environments on campus allow students to maintain and improve their well-being through a holistic approach to learning and living.

Beauty: Our Meritage Collection luxury spas are seeing an increase in male patrons, and as a result, we have developed treatments such as the “Men’s Essential Facial” and other offerings tailored to meet their wellness needs.

Fitness: As mentioned above, wearable devices are assisting consumers in keeping track of their health with real-time updates on their fitness goals.

Nutrition: There has been a paradigm shift from dieting to more of a focus on nutrition and wellness.

3. How would you describe the state of workplace wellness in your country?

Wellness in the workplace is rapidly changing with the latest work force demanding more vacation time and perks than previous generations. Companies understand that healthy employees are more focused at work and produce better results. Therefore many employers are developing workplace wellness programs that focus on employee personal development, philanthropy and health.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The demand for spa and wellness services continues to rise in the U.S. with consumers investing in preventative treatments to help them maintain their health. With the high cost of healthcare and the medical community using more prescription drugs to help patients manage ailments, consumers are turning to spas and wellness centers to provide holistic and natural solutions to their health problems. Reflexology and massages with organic essential oils are popular among spa guests who would like to reduce muscle pain and relieve built-up tension and stress.

5. Whose responsibility is it to create a well world?

Everyone shares in the responsibility to develop a world where wellness is a focus and priority. Our Meritage Collection luxury spa resorts enable guests on their wellness journey through offering revitalizing treatments and overnight spa packages to relax and transform the mind and body.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

The U.S. is busy applying incredible research advances by the scientific and medical communities in the field of the human microbiome - the body's complex system of microorganisms which helps support and maintain health. This includes the digestive tract and also the largest human organ, the skin. We see this as the new frontier of wellness. At ZENTS, our skin care products have already begun to evolve. New formulas will create a probiotic effect on the skin, and new spa treatments will feature a probiotic tonic that is taken internally.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Spas are expanding their wellness and longevity services, reaching further into clients' daily lives through health consultations and coaching, including daily/weekly/monthly calls and emails that help clients reach their health goals.

Wellness Tourism: Wellness tourism is on the rise and people are interested in learning ways of incorporating what they are doing at the spa and resort into their daily life.

Wellness Living Communities/Real Estate: In the US, we see an ever-increasing demand for this type of community, and we are thrilled to help contribute to it!

Beauty: The industry is responding to customers' demands for result driven beauty with mindful ingredients. Biodynamic is the new organic.

Fitness: People are interested in not only the traditional fitness of cardio, Pilates and lifting weights, but a surge of softer, more gentle fitness options like restorative Yin yoga for the overworked, stressed out guest.

Nutrition: Longevity is in—finding optimal foods, probiotics, and supplements for bio-hacking the body to slow or reverse the aging process of the body and mind.

3. How would you describe the state of workplace wellness in your country?

In America, workplace wellness is sadly behind the research. Many of the leaders in the wellness community are not being supported to live a life of wellness. The spas and resorts we work with are finally recovering from the economic downturn, but many are still not able to return to previous staffing levels. This has led to a long-term issue of unmanageable workloads and unhealthy work-life balance. Vendors are in the same situation for different reasons. It is time for us as wellness leaders to create a grass-roots revolution of wellness in the workplace. It is impossible for us to teach and create wellness for others if we are not doing this for ourselves.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

I see a growing interest in investing in modalities that have quantifiable results, from stress management, to nutritional counseling, to bio hacking with longevity emphasis, to wellness coaching. These techniques are taking us to a new and deeper level of wellness, which is very exciting.

5. Whose responsibility is it to create a well world?

It always starts right here. We must not only talk about wellness but take simple and radical steps to live it. We cannot truly implement and spread the wellness transformation unless we are doing it ourselves.

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Z E N T S

NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

Demand for “spa weekends” is increasing with expectations of “european spa amenities” like cold plunges, kneipp walks, salt bath.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Wellness Tourism: Wellness Tourism in our region is not a theory but a reality, our tourism is built on skiing, hiking, biking, etc. a different type of “wellness tourism” and the same goes for living communities. We tend to live the wellness and fitness and the spas are our addition to those natural amenities.

3. How would you describe the state of workplace wellness in your country?

Much more awareness is being given to promote the wellness aspect i.e. encouragement from employers towards reward systems to stay healthy and fit, as a Nation with national “Bike to work” days etc.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The spa industry is seeing growth and financial investments to improve upon existing spas and re-structuring high end hotels to include high end spas and attendant services. Our very own Iron Mountain Hot Springs, which opened this past month, is a prime example of a huge financial investment with still unknown risk factors but a firm believe that we should strive toward more relaxation, restoration and rejuvenation.

5. Whose responsibility is it to create a well world?

The responsibility sits with the individual to take the first step towards wanting a level of “conscious well being” versus just following the routine, which in turn will create a demand upon the business world to provide services, outlets etc. to provide the tools.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

Wellness is making news continuously in the US, because the word itself is becoming more “mainstream”. The use (overuse?), however, is what is making true wellness misunderstood. Can one call a vacation a “wellness” vacation because a massage was received? Is the lunch ordered in a restaurant a “wellness” option just because it contains a vegetable? Are wellness services in medi-spas really wellness, when invasive techniques and harsh chemicals are used on the body? The misunderstanding of the word creates opportunities for those not in the true wellness business, to tout something that is not truly well.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Bespoke services that provide a personal approach to the wellness goals, no matter how big or small, of guests.

Wellness Tourism: Personal fitness and nutritional guidance while on vacation offered in a fun, joyous, and relaxing way.

Wellness Living Communities: Communities that incorporate physical activity areas and regions beyond the gym, those who incorporate Mother Nature’s fitness gym for the best in wellness!

Real Estate : Planning outdoor areas for physical fitness and relaxation.

Beauty: The media’s accepting of natural beauty in realistic sizes and shapes, especially for young women today.

Fitness: Physical Education, nutrition, sports, art and music programs in all schools for all children in all demographics and the funding to teach these imperative subjects well by qualified educators!

Nutrition: Same as above.

3. How would you describe the state of workplace wellness in your country?

Workplace Wellness must start with us in the spa and wellness industry. The number of Spa Directors today, who are completely burned out, and getting sick from stress, is the most disturbing indicator of how much we need to work on this. We should be the educators about his topic.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Resort owners and developers in the luxury sector have known for years that in order to remain competitive they must have a full service spa component that offers the “treatment with the treatment”. What can they offer their guests before and after the purchased time on the treatment table? Today more than ever, we are seeing investors who are themselves on a quest for wellness, and who have specific wellness requirements for their developments: specific fitness equipment, the desire to employ their personal trainer or yoga instructor at their property, sharing personal experiences in wellness so that their personal experiences can be recreated in their properties.

5. Whose responsibility is it to create a well world?

Our industry will provide better overall education about wellness for all ages, leading to an increased understanding of the concept among spa consumers. Spas will use wellness terminology, technology and tools when they are appropriately educated. Guests come to spas with differing levels of knowledge and wellness goals. Our challenge is to offer services that relate to the non-exerciser who wants to lose 10 lbs., to the marathon runner who needs to learn about performance nutrition. So it is up to us to find the programming that can offer some common ground in order to effectively deliver hospitably, with an ROI, and be operationally feasible.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

The Balneological Association of North America. (BANA) a not-for-profit research, information and educational group for the study of the arts and sciences of Baths and Bathing.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

The Waters & Wellness Tourism: A growing interest in natural mineral springs tourism; Colorado, New Mexico and other Rocky Mountain states are emphasizing wellness tourism to historical spa towns and sites like Manitou Springs, Glenwood Hot Springs, Truth or Consequences and other natural mineral water sites, all of which were established around the natural geothermal mineral springs and sources.

3. How would you describe the state of workplace wellness in your country?

Steady development, evolution and transformation beyond the exercise gyms and physical fitness programs towards a broader holistic Wellness that is not only a Lifestyle, but programs that can be a central element for Wellness Workplace Cultures.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Natural geothermal mineral springs, especially in the western mountain areas of United States are experiencing increased interest in development for wellness travelers and wellness tourism destinations that emphasize healthful and recreational experiences.

A few examples include: Iron Mountain Springs (Glenwood Springs, CO); Sunwater Spa (Manitou Springs, CO); Avalanche Ranch Hot Springs (Redstone) as well as the

hot springs and pools of Truth or Consequences, NM and other natural geothermal sites throughout New Mexico and the western mountain states. The general public is reconsidering the value of costly and often unnecessary pharmaceutical and extreme surgical interventions, especially when and where there is no insurance for these extreme medical treatments. Here there is much room for development and growth, especially with wellness and rehabilitation.

5. Whose responsibility is it to create a well world?

Conscientious individuals, groups and associations leading and working in creative harmony within private and public political, economical, ecological and spiritual communities serving to manifest Wellness Cultures, especially based around The Wellness of Waters in Nature and The Nature of Wellness from The Waters.

SUBMITTED BY:

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

There are several movements gaining momentum in the United States. We are seeing various nature movements such as Earthing, Forest Bathing, Localvores, Farm-to-Table, etc. that all point to a desire to return to the land. As Thoreau said “I believe there is a subtle magnetism in nature, which, if we unconsciously yield to it, will direct us aright.” There is a primal connection to the land being reignited. We instinctually know of nature’s power to heal and restore our equilibrium.

Brain health and brain state optimization are also becoming very popular as we understand more about how stress affects us physically and how technology can negatively impact our mental capabilities. Meditation, brainwave optimization and other tools will continue to become more commonplace.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Techniques that regulate the Autonomic Nervous System such as Manual Lymph Drainage, hydrotherapy, castor oil packs, Craniosacral work, etc. to address stress and encourage the body’s natural healing ability.

Wellness Tourism: Iconic American thermal water facilities are being restored as we recognize the numerous benefits of balneotherapy.

Wellness Living Communities/Real Estate: For years these developments were marketed to aging populations but now we are seeing projects aimed at populations of all ages simply looking to create community with like-minded individuals aspiring to create a wellness oriented lifestyle.

Beauty: Growing awareness of toxic ingredients in skin and body care products has improved research on safe, yet effective alternatives.

Fitness: There is less focus on exercise for weight reduction and more attention given to movement for other reasons such as to encourage lymph flow, address chronic pain, and to spend time connecting with other people.

Nutrition: Transdermal nutrition, via algae and other nutrient rich sources, is becoming more important as we face rapid soil erosion and nutritionally void produce caused by modern agricultural practices.

3. How would you describe the state of workplace wellness in your country?

For years employers have been demanding increasingly more hours and more productivity. Advances in technology have compounded the problem changing expectations about accessibility and connectivity.

I believe we are coming to a tipping point. Research is linking most chronic diseases to a root cause of stress and employers are taking note of rising healthcare costs. We are starting to see many companies increase their workplace wellness offerings not only to reduce the benefits burden but also to attract and retain talent now that the economy is gaining momentum.

Millennials have pushed back against traditional work structures and are creating new models to work smarter, not harder. Older generations are also reflecting upon what really matters to them and an elevated consciousness is causing them to draw their own boundaries which is ultimately proving to be effective in setting a new work-life expectation.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Investors have taken note of the impressive growth in our industry. In 2007 wellness tourism was valued at \$60 billion and is expected to be valued at \$678 billion by 2017. This enormous growth in one decade is attracting investors who are looking for similar colossal returns. However, many are looking to the wrong places hoping for short term gains from machines and products with ambitious claims.

At the same time we are experiencing rapid growth in demand of wellness services, we are also facing a serious shortage in a qualified workforce to support this growth. Yet little investment is being made in the education necessary to grow spa therapists, often accustomed to working from protocols, to wellness therapists, who require much more sophisticated methods of intake and consultation as well as analytical and science-based treatment skills.

Delegates of the 2011 Global Spa & Wellness Summit in Bali, Indonesia, rated “training/education” as the #1 challenge facing the spa industry today, and also rated “lack of professional human resources” as the #1 obstacle to growth for their own

businesses. Historically we have expected trade schools to produce a qualified workforce but very few institutions have evolved their curricula to suit the growth of the wellness industry.

Significant investment by employers in post-graduate therapy programs for their teams is critical to meeting the demands of the booming wellness industry. The wellness client demands significant results and only facilities with exceptionally knowledgeable staff will thrive.

5. Whose responsibility is it to create a well world?

It is the responsibility of all humanity, including governments, the medical community, both traditional and alternative, individuals, educators, the media, and employers, to unite in working toward this common goal.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

All the ink is going to boutique fitness, fitness fashion, meditation, and juicing.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: US spa industry is still highly fragmented and there are only a handful of national brands. Growth is occurring primarily in the non-luxury sector, the low cost, membership franchise model.

Wellness Tourism: Wellness tourism is feeding the insatiable appetite for wellbeing, spa and fitness experiences. Offered in conjunction or as an extension of a hospitality venue, programs such as boot camps, retreats, festivals, lifestyle educational programs all engage, and attract hotel and resort guests. Further, these programs activate the local community, and bring life, energy and drive incremental revenue, something all hotels and resorts are working very hard to achieve.

Wellness Living Communities/Real Estate: Demand for wellbeing living has continued to increase in urban and suburban markets. Enlightened developers are starting to expand the manifestation of wellbeing living—to incorporate more than traditional spa and fitness facilities. We are seeing development that foster wellbeing and healthy lifestyles through design, sustainability, environmental considerations, as well as programs and community centric measures. We have just scratched the surface.

Beauty: Personal care innovation is centered on prevention and beauty for skin, nails, hair.

Fitness: Boutique fitness studios are poised in the sweet spot of an attractive growing industry. The Boutique sector is a \$7B segment predicted to double in the next five years. Barre, yoga, spin, boot camp studios with premium experiences,

quality instructors, group energy and a strong sense of community are proliferating and stealing market share from gyms. The entrance and rapid growth of third party platforms such as Classpass are making headlines and disrupting the sector.

Nutrition: Food is more than nutrition. It is now viewed as a powerful weapon to prevent illness, improve sleep + wellbeing, and better lives.

3. How would you describe the state of workplace wellness in your country?

On the positive end, workplace wellness is becoming more imbedded in company culture, more part of the fabric of the workplace. Wellness in both the physical and cultural sense. Think how those that play together, stay together. It's about creating bonds, which improves camaraderie, team-building, employee engagement, and general workplace happiness, all of which are growing in importance especially among millennials.

On the other end, workplace wellness programs are controversial because they are focused on measuring results and tying them to reduced benefit costs. The tracking and measurement has led to discrimination concerns and privacy concerns. Perhaps the perspective should be shifted *from measurable programs to desired programs*. Every organization has a unique employee profile, and one may be drawn to mindfulness training and on-site yoga classes while another wants smoking cessation and stress management programs. If the members of the organization have a voice in the selection of programs, the compliance and participation might be higher. And then, the programs would generate higher engagement and improved sense of community, and—better outcomes!

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The spa/wellness sector has garnered substantial interest from the private equity community. They are especially interested in early niche concepts which had not been well developed. They paid for potential and assumed that immediate growth was the priority, leading to investing in the company's infrastructure to grow the business at a rate 3-5X of its previous level.

The barre class segment has seen real investment and most are using the franchise structure for future company growth. Pure Barre, Bar Method, XTend Barre and Barre 3 have benefited from recent investment. Yoga Works was recently sold to a new private equity firm. Barry's Boot Camp was another benefactor of this movement.

Soul Cycle is about to go public. Flywheel also received private equity investment. And Class Pass, a marketing aggregator, has received significant venture funding in the last year. The studio concept is being studied regularly, especially by private

equity firms who are not current investors in the space. This is a "hot" targeted segment.

There are two major transactions that occurred this year in the spa sector. Hand and Stone, a franchise mid-market membership spa brand was acquired by Levine Leichtman Capital Partners, and Catterton took Steiner Leisure private for \$925mm.

5. Whose responsibility is it to create a well world?

This is not a responsibility. This is an opportunity. Building a well world is a pursuit that offers hope for addressing real problems and the future of mankind depends on it.

Industry leaders and associations have the opportunity to thoughtfully identify, articulate and align around the problem, and agree on a shared mission and voice, and attract other enlightened leaders in business and the medical world to collaborate on the platform.

The pursuit is so big no one entity or collection of entities can be held responsible. This is a movement, a campaign. A good example is Koop taking on big tobacco. It was generational, and it worked, but over many years. Wellness is, I think similar. The time is ripe.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

Improving the quality of care, experience and therapeutic outcomes that are measurable is critical in wellbeing globally.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Accountability, reliability and sustainability of service are very important developments for everybody.

3. How would you describe the state of workplace wellness in your country?

Strong and vibrant.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The continued development and investment in scientifically validated products and services are important in the improvement in the quality of services from all providers.

5. Whose responsibility is it to create a well world?

We all share an equal role and responsibility in the creation of a well world for ourselves and our communities.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

On-demand mobile technology- making top-quality wellness and other health, spa, and beauty services from licensed professionals available same-day in the homes, hotels, and workplaces of customers.

3. How would you describe the state of workplace wellness in your country?

Companies are increasingly understanding and promoting the value of wellness in the workplace, which makes perfect sense. Wellness -- including yoga, meditation, and massage -- has been proven to boost the immune system, improve mood, alleviate stress, and reduce neck and back pain. In fact, HSA and FSA accounts popular under the Affordable Care Act, allow employees to pay for massages with pre-tax health dollars, if they have a prescription from a doctor. Some of these HSA and FSA accounts are supplemented by employers. Other workplaces are bringing massage directly to the office, scheduling chair massages for employees as an affordable and healthy reward.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

From a VC perspective, the wellness/spa category has become increasingly interesting. A growing number of funds are waking up to the possibility that there are many \$1B+ businesses (or “unicorns”) in this category.

5. Whose responsibility is it to create a well world?

We can all work together to create a well world. Schools can promote nutrition, wellness and mindfulness from nursery school on up. Employers can encourage workers to take time for decompressing, volunteerism and self-care, or bring wellness services directly to the workplace. And everyone can find time to promote environmental and personal health.

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zeel

Massage On Demand®

NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

Wellbeing is more front of mind than ever. Everyone is interested in determining some dimension of wellness that fits their lifestyle. Being healthy and feeling good is a foundation of looking and feeling beautiful.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: There is very little innovation within Spa industry in the US.

Wellness Tourism: ; It is a growing concept, but still not as big as it could be.

Wellness Living Communities/Real Estate: It is a successful concept that investors are very interested in.

Beauty: Feeling good, being in balance is the new beautiful.

Fitness: The extreme fitness is huge on one end, and on the other, there are other options such as 7 min or 15 min total body workouts that are immensely popular and more attainable.

Nutrition: It is becoming common knowledge in the US, that the quality of food we eat determines the level of our wellbeing.

3. How would you describe the state of workplace wellness in your country?

It is still very remote goal for companies. There have been small moves made in that direction, but for the most part, the workplace wellness is a not an option for the majority of employees.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

I feel that there has been some investment but only to take over, modernize or update the existing spas. The growth and spa development has been robust only in Asia. Investors understand the value of spa as an amenity but have been witness to lack of profitability for spas as a separate business entity within hotels.

5. Whose responsibility is it to create a well world?

All of ours! We all have a responsibility to educate, spread the word and make the process of achieving optimal wellbeing fun and accessible.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

As a physician practicing functional and integrative medicine, I am seeing a shift in healthcare to include preventive healthcare, the inclusion of “alternative” providers into mainstream, conventional medical settings, the appreciation of the limitations of conventional medicine in caring for chronic disease and the need to develop approaches to health beyond the pharmacological ones that dominate today.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Fitness: Fitness is moving out of stagnant weight stations and into more group movement classes. Competition between these participants in a group class is at a new high. These same classes are forming social circles that extend beyond the gym and so fitness is now where many people are creating community.

Wellness Communities/Real Estate: As a physician practicing in a wellness residential community, I see the demand for this type of lifestyle growing. People want to surround themselves with likeminded neighbors also engaged in a healthy lifestyle, and they do not want it to be excessively rigorous, but rather a blend of social activities, exercise, learning, healthy food, etc.

3. How would you describe the state of workplace wellness in your country?

Increasingly people are aware of better food choices at work, the need to stand up and move throughout the day and other behaviors that can nurture wellbeing. But these efforts are but a small attempt to safeguard against long hours and work the bleeds into personal time constantly. The globalization of our work lives and interacting with other parts of the world on different time zones also challenge life-work balance.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Our property, the Carillon Hotel, is a great example of what travelers want: a vacation that offers them the opportunity to improve their wellbeing at a deeper level than just "vacating". It has been a large investment by a group that has no previous experience with this industry, but sees it as an important offer in tourism and lifestyle.

Spa is at the dawn of being taken more seriously than "just pampering" and people are beginning to understand the health implications of what a spa offers and expanding on that.

5. Whose responsibility is it to create a well world?

Every individual has a role in this....

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THE CARILLON
HOTEL & SPA
MIAMI BEACH

NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

The news on wellbeing in the U.S. runs through a few streams of intelligence: Medical Studies, Technological Advances, and the rise of Health Issues in the environment and workplace.

This year, while we continue to come up with new studies/theories on weight management and fitness optimization, one of the new stories being told is in technology, first with the Fitbit and now with the Apple iWatch. Such wrist wear is putting fitness practice within our reach at all times, making it possible to get those 10,000 steps in each day, to monitor our heart rates and calories, to not become victims of the computer potato syndrome (even if that Stand! command from the iWatch is mercilessly annoying).

What continues to make news in the U.S. is the fast-rising interest in Wellness as a tourism niche. It is no secret that the industry seems to be exploding in global numbers (SRI International reports that wellness tourism is a \$494 billion international industry and 14 percent of the \$3.42 trillion in total global tourism revenue) but now the once special interest niche seems to be going mainstream. Travel agents are ramping up in this field selling a week at Rancho La Puerta as easily as a cruise or vacation to Disney World. And the customers are buying. According to a recent Virtuoso blog,

“Wellness means different things to different people and when we work with our clients, Wellness Travel is about finding the right property and experience that will boost and enhance their current state. Wellness Travel is NOT just going to a spa, it’s NOT just drinking green juice, it’s NOT just doing yoga everyday. It’s so much more. We define Wellness Travel on a spectrum: Everything from weight loss and detox programs, to active adventure travel, to wilderness and wildlife immersion, to learning journeys to rest, rejuvenation and spa getaways. These are all resources along the path of personal wellbeing.”

Similarly, the Business Travel sector is gaining interest in this industry as “bleisure” becomes an increasingly important part of the business travel itinerary. Business

Traveler USA (which goes to 175,000 paid road warrior subscribers in a monthly print glossy) just introduced a standing Lifestyle section that includes health interests and spa escapes in pages formerly reserved for airline news and new aircraft designs.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: In the U.S., spas are becoming more ubiquitous – targeting as wide a range of customer as possible (including pets and kids) and are now a mainstream service to be found in airports around the world for passengers who want to attend to their wellness needs on the fly.

Wellness Tourism: This is becoming a mainstream topic evidenced by the rising numbers from travel agent bookings and the inclusion of Wellness Tourism seminars – including Medical Tourism – at travel industry conferences (Example: The inaugural WTM Wellness Lounge at World Travel Market, the world's largest travel industry expo with more than 17,000 attendees, held in London each year). Also this January the new York Time Travel Show will include a wellness pavillion.

Wellness Living Communities/Real Estate: As America's baby boomers retire we are seeing this conscientious population choose alternative and breakthrough lifestyles for their golden years (much as we saw them at the frontier of the freedom movements of the '60s and '70s), and this means a new trend in like-minded souls coming together for planned wellness communities. Places like Alternavida in Puerto Rico and Flora Farm in Los Cabos are new experiments in sustainable, organic living and lifestyle that put wellness at the forefront.

Beauty: Most hotel and destination spas are using organic products in their therapies and stressing non-surgical ways of enhancing beauty with a holistic lifestyle approaches. Also you see podiatrist and chiropractors offering botox and crossing over into the beauty areas to create one stop shopping.

Fitness: This area has seen the most change over the past two years with emphasis on technologies that can monitor health, sleep and metabolism changes minute to minute through the daily cycle – allowing wellness-minded users to measure and manage fitness to optimal advantage. Also, fitness clubs are offering medical testing to further customize workouts to provide exact plans to target heart rate and weightless.

National Research: While more eyes are on health matters and more research comes out on the various common disease elements in our society that can be prevented or

helped with certain mindful actions, true science beyond evidence-based research, is still an area sorely lacking for wellness professionals for therapies that are not pharmaceutical in nature.

3. How would you describe the state of workplace wellness in your country?

In an always on, 24/7 technologically-based work culture, workplace stress, alone, costs U.S. companies an estimated \$300 billion annually and sleep deprivation another \$63 billion or, more specifically, an estimated \$2,280 per employee. Long hours, job insecurity and lack of work-life balance — contributes to at least 120,000 deaths each year and accounts for up to \$190 billion in health care costs, according to new research by two Stanford professors and a former Stanford doctoral student now at Harvard Business School, as reported in Wired Magazine.

Still, little emphasis is placed on the wellness of the worker beyond insurance coverage, if that. Recent reports about working at Amazon, perhaps the new model for the American Corporation, shows that white collar working conditions are only getting worse – overtime, vacation time, sick days, maternity leave: these are no longer rights that get respect. The average American leaves 11 days of their annual two weeks of vacation on the table for fear of losing their job. Much of the American workforce is now a fragmented landscape of contractors with no rights, no job security and no benefits at all.

Wellness in the workplace, if it exists at all, is up to the worker to carve out of the workday for himself or herself through discipline and skilled time management.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Spa and wellness investment is best seen through a recent trend in hospitality that has used wellness as a concept to sell room nights. No longer is spa and wellness limited to the territories of upscale resorts in exotic locales. MGM Resort in Las Vegas offers a span of wellness rooms that have such amenities as filtered air, circadian lighting and vitamin-infused showerheads. Even Hotels, a new division of InterContinental Hotels, offers in its tag line: “Where Wellness is Built In,” and targets the burned out business traveler as its ideal guest. Starwood is launching a “Wellbeing Movement” through its Westin brand, which revolutionized the guest experience in sleep during the 1990s with its Heavenly Bed.

5. Whose responsibility is it to create a well world?

This will likely redound to consumers, whatever their nationality, to set a course for a healthy lifestyle – a condition that happens via food choices, mindful actions, fitness

discipline, an explorer's curiosity and an ability to be still. Should these approaches and values strengthen and become part of a core of what makes up a culture small or larger, the demand for wellness ways in products, services, information, work policies and urban environments will strengthen to eventually become the norm. It happens imperceptibly, person by person, but as with the "100th monkey" adage, the one more person eventually becomes the village, the expectation, the movement. Wellness is a personal choice and for a well world to come about we need rest from war, terrorism, scary politics, unfathomable economics and relentless technology and perhaps a decision to opt out. Through focusing on our inner selves we will eventually find community and a willing well world.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

We see a “wellness mania” running rampant in the U.S. with the word extending far beyond the historic spa and health resort space and conceptually leap-frogging into everything from consumer packaged goods to clothing and even fast food. Businesses are acting on the rise in available data and creating products, services and experiences with the goal to capitalize (or monetize) consumer demand for all things “well.”

Within the “noise” are some very serious, noble efforts from large pharmaceutical chains such as CVS Health, cool technology apps like HeadSpace.com, and travel and hospitality brands (too many to mention), attempting to cater to a much savvier, U.S. consumer. This consumer spans generations – from millennial or baby boomer – and is simply more conscious and informed about factors affecting his/her personal wellbeing, and the wellbeing of those whom they care about.

In fact, according to the research team at Women’s Marketing, “wellness is the new black” and today’s wellness consumer is largely female – coined “Passionistas” – who share a core belief that “optimal health and wellness is rooted both in mind and body” and seek products, services and experiences that help support the cause. It’s clearly time to welcome her with open arms, but without authenticity and clear points of differentiation to rise above the chatter, do not be surprised if she does not hug you back.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Are being put to the test as demand for wellness-related facilities, programs and treatments extend beyond their four walls.

Wellness Tourism: Is outpacing growth in traditional tourism sectors, and is producing higher-yield tourists; those who are willing to spend more money to simply travel well.

Wellness Living Communities/Real Estate: Is on the rise with pioneers moving beyond the health of buildings to consider both VOI (value on investment) and ROI (return on investment) for both residents and developers alike.

Beauty: Is now considered a key part of personal wellbeing, particularly for millennials who attribute looking good to feeling good.

Fitness: Is as much about technology as it is about movement, and smart companies are working hard to connect the two in order to sustain long-term relationships with their consumers.

Fashion: Must increasingly cater to well-minded consumers who consider brands like Lululemon Athletica to be status symbols akin to those of Louis Vuitton or Prada.

3. How would you describe the state of workplace wellness in your country?

I believe the state of workplace wellness in the United States is undergoing a period of “reinvention.” Early adopters who spearheaded programs to simply “check the box,” or who were solely motivated to reduce a company’s healthcare costs over time, are grappling with investments that have since underperformed. And forward-thinking companies are contemplating how to move the conversation beyond wellness-related programs and facilities (i.e., what’s offered to whom and where) to one that speaks to overall company culture, employee engagement and productivity.

I also believe that the market is finally ripe for meaningful dialogue among companies and providers, no matter how big or small. Today, the workplace wellness vernacular is more common place, and established spa and wellness providers can now connect with companies on a local level to identify mutually beneficial solutions to help keep employees happy and well.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

In a nutshell, there is a resurgence in the willingness to invest in the development of physical establishments, as well as the creation of wellness-related products and services. For example, we’ve seen major, multi-branded hotel chains like Starwood Hotels & Resorts and Marriott International with strong hotel development pipelines, much like those witnessed pre-recession. And every day, there’s a new mobile app or website promising content, tools and resources to help support time-starved consumers with healthful tricks and tips.

What's most compelling to me is the "budding" understanding that there are qualitative as well as quantitative reasons to invest in the greater spa and wellness community, and a seeming willingness from investors to consider how the two should go hand-in-hand.

5. Whose responsibility is it to create a well world?

Without question, we have a shared responsibility to create a well world. It will take business leaders and followers, managers and employees, educators and administrators, parents and children, non-profits and for-profits, residents and visitors, community members and developers, investors and operators, manufacturers and service providers, capitalists and socialists, realists and dreamers – and everyone in between – to elevate our collective conscience to build a greater quality of life for all of our planet's citizens.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

Functional medicine is the cornerstone of helping people get to root cause and guide them back to wellness. More people are reading about environmental changes, benefits of diet changes & organic food, and the power of community. There is also increased awareness of the benefits of meditation, yoga, walking and moving during the day. Standing desks for most companies is the norm and people are more aware of the damage of sitting and how to try to stay well in a sedentary, high stress world.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Spas need to encompass teaching people how to eat and center themselves-empower them after treatment.

Wellness Tourism: Wellness Tourism is prevalent and if we ramp up the quality of spa wellness programs it will flourish.

Wellness Living Communities/Real Estate: Wellness living communities should be heavily focused on since all the literature points to the power of community being the main factor in a long, healthy life.

Beauty: Prevention, anti-inflammatory diet, organic skincare/makeup, water and food quality will help people achieve beauty.

Fitness: Fitness is a spectrum and people are understanding that they don't need to run a marathon to be fit, walking and moving daily has enormous health and wellness benefits.

Nutrition: The science and practice of Nutrition (nutritional counseling) is poor on the whole and good, evidence-based nutritional information needs to be taught to primary care MD's to begin to make a dent in chronic illness that is growing in the US.

3. How would you describe the state of workplace wellness in your country?

There is a spectrum where we have some companies flourishing with true corporate wellness programs and others that may provide one workplace adjustment. Many companies are doing wellness or health fairs and are promoting people staying well by providing quality water, exercise class, ergonomic changes to work space, implementation of standing desks, massage therapy, meditation class or space, and doing workplace challenges to get people up and moving (staircase challenge, fit-bit races, etc).

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Spa industry boomed and too many came out all at once so many have closed. Not many want to take the risk in investing. There are not enough that offer comprehensive programming, not enough that differentiate themselves, and too many doing the same thing- pay per massage, sauna, steam, etc. We used to have 3 spas in a 3 block radius (in NYC) that did everything from massage to yoga group classes to pedicures and 2 closed.

5. Whose responsibility is it to create a well world?

To change everything it takes everybody! The medical community needs to link with the spa community to truly get the message out and create change. We are up against the largest growth in chronic illness and the mainstream medical system is not equipped to help these individuals. We are at the forefront because true wellness is only achieved with better nutrition, mind-body practice (Yoga, meditation, breath work), movement practice, and workplace/leisure time balance. We know that in order to feel well you need to be aligned with a mission and passion and be connected with this in your life and community. We can help foster that community and reawaken others' passions!

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

Technologies like Zeel entered the market and created a disruption in the industry with their Massage on Demand App. The app serves a different target group than spas that wants to experience wellness at home, on demand sometimes within an hour.

On another note, everybody is talking about wellness and wellbeing and wants to live healthier. This change in attitude creates a huge potential for spas, alternative therapies and the food market. Some spas like Turnberry Isle Miami react on that high demand for wellness, health and anti-aging by implementing “Wellness Programs” often accompanied by medical doctors.

Also interesting is the difference between the needs and expectations of millennials and baby boomers and how spas try to react to capture these two different market segments.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Spas are no longer seen as luxury but a necessity and consumers are demanding results driven services.

Wellness Tourism: Spa is an essential ingredient with regards to the growth of wellness tourism and spa will be available at all price levels.

Wellness Living Communities/Real Estate: Decline in traditional country clubs as more private communities are forced to offer more leisure facilities.

Beauty: Consumers are savvier when selecting beauty products predominantly regarding General awareness to ingredients.

Fitness: Health and fitness on a regular basis will continue to expand.

Nutrition: People are realizing that their longevity is within their control and are looking at cleaner/healthier ways of eating.

3. How would you describe the state of workplace wellness in your country?

The current state of workplace wellness in our country is trailing far behind many other nations that have had strong support benefits in place for employees for many years. However, what is exciting, is that many companies are “talking” about what wellness initiatives they can take on to better support wellness in the workplace. However with many initiatives, once Americans get behind a belief or initiative, they explore opportunities and do so in a big way! Wellness is on everyone’s mind and “to do” list. In the coming years, we can expect to see more education, support and methods of inspiration within our workplace. Employees are challenging employers to step it up, and we look forward to wellness initiatives being a talking point in the new hire process, as Human Resource Directors present compensation and benefit packets to new hires, with Wellness Initiatives being a compelling and valuable employee benefit.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The spa industry has grown from \$60 billion in 2007 to \$97 billion in 2013, as well as the confidence level of spa management and investors. With an annual 7.7 percent growth rate, even during recessionary years, spa investments in the U.S. for expansions, improvements and large scale renovations is simply smart business. With the recovering economy coupled with the rising demand for spa and wellness services, investors are funding projects from all levels within this business sector. Research shows that spa goers are willing to pay extra to enjoy better services that make them feel good, look good, become healthier and more energetic. Consumers are particularly concerned with anti-aging ranging from the physically visible to the internal, movement and functionality. The demand for anti-aging in spa and wellness justifies the investment towards keeping up with the facilities, service offerings and programs to keep spa and wellness services current and alluring.

5. Whose responsibility is it to create a well world?

Everyone...it starts in the home...and with the individual. However, society (government, workplace, educational institutions, etc.) is also responsible. It’s an exciting time to unite as human beings and work towards a cause that brings immense benefit to us all, collectively and individually.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

The consumerization of wellness/wellbeing due to the health crisis in the US is pushing people to look for alternatives at a rate never seen before. Proactive rather than reactive health management is not just a term used for integrative or functional medicine any more. From thermographics that confirm inflammation in the body to phone apps that track pretty much everything to sleep pods at spas, the new gamut of options is becoming more and more available to mainstream America where as a whole, consumers are reaching out to take charge of their own health. Clearly, with the myriad of information that is available on the internet, Americans are embracing wellness from more than one perspective.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Coming back stronger and with more passion to provide patrons with health and wellness solutions to their guests

Wellness Tourism: Due to the high cost of care, not only the wealthy are seeking destinations outside of the US to manage and resolve their health issues and wellness needs.

Wellness Living Communities/Real Estate: The surge in building sustainable, healthy homes and work places where individuals can live in clean, safe environments because builders see the financial benefit of creating this type of product.

Beauty: The external way to internal health where now, beauty stores are adding programs like yoga and farmer's markets to their offerings.

Fitness: Variety in exercise equals balance and fun opening the doors to sports, activities and even meditation that before now, flew under the radar.

Nutrition: The Food and Drug Administration has required that trans fats be removed from human foods over the next three years recognizing that it is not fit for consumption.

3. How would you describe the state of workplace wellness in your country?

In the US, while there have been great strides toward a healthier workplace, we are still not where a first world nation and global leader should be. Productivity is at an all time high with fewer people executing the same number of jobs where stress, lack of sleep and poor nutrition is the result of having no time to recover. The standard two-week vacation continues to be the norm leaving the US at the bottom of the list when compared to what other countries require businesses to provide. On top of that, studies show that even while on vacation, most people check their emails or make/receive calls for work. Until we fully realize the importance of having clear-thinking, healthy workers, we cannot say that workplace wellness is our first and foremost priority.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Coming from the hotel sector, I have seen a shift in what hoteliers are willing to investment in wellness. There has been a significant positive change toward opening their traditional business model to something more than rooms. Understanding that this is still their primary business, it is important to provide wellness solutions that are low risk/cost and high reward.

Example: On a current project, I recommended that my client qualify their Health and Fitness Manager (who already had a degree in nutrition and not using it on property) in Wellness Coaching. They did so and as a result, her new role will be the constant source of recurrent wellness coaching to staff, members and guests, as well as be a beacon for good habits in nutrition, sleep, fitness and happiness. While the investment may not seem significant with respects to the actual cost of qualifying her, the statement that it makes toward the property's wellness mission, is a healthy one.

5. Whose responsibility is it to create a well world?

The responsibility falls on those who have the knowledge, means or voice to be able to make change; so basically, everybody. Even in the smallest way, we all can make change.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

Wellbeing is an active pursuit of enjoying good health and a quality of life. We have a world of choices and it's about making the choices that provide us with a better quality of life and that allows us to continue doing the things we most enjoy.

At Williams Island, the Florida Riviera, and Spa Innovators, an educational resource for spa and health professionals, we believe our lifestyles may vary but the bottom line is being able to live your life enjoying that lifestyle in good health.

It used to be specific programs being promoted but the essence has become eating healthy and that means your body feels good with your diet; your exercise regime is what keeps you moving and active and your mind and spirit flourish and are rejuvenated by your spirituality and practice of mind thoughtfulness.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: A facility that enhances your wellbeing rejuvenates you and provides you with a lifestyle practice.

Wellness Tourism: A tourist trip that enhances your wellbeing while enjoying a different culture and/or geography.

Wellness Living Communities/Real Estate: A community that encourages teaches and provides lifestyle choices that enhance your wellbeing.

Beauty: Beauty is a look, an act, an attitude, a gesture and making the most of what you have.

Fitness: This is a balance of body, mind and spirit through moving, sleeping and eating that allows you to enjoy all the things in life that is important to you.

Nutrition: Nutrition is what you provide for your body to survive and good nutrition is what allows your body to be and function at its best.

3. How would you describe the state of workplace wellness in your country?

There have been many attempts at workplace wellness but often eliminated for budget reasons as it is the first item to be cut when facing financial challenges. It will become more successful through leaders and individuals who take a stand to promote workplace wellness nationally in corporations and through their own example.

We have a long way to go but there are some corporations who invested in on site programs and whose employees reap the benefits.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The building of private communities including spas and fitness centers offering it as a lifestyle choice; the many hotels and private clubs being established offering spas and health clubs, resorts offering spa and health journeys and vacations, medical facilities incorporating spas and health programs as a part of their services, neighborhood parks adding programs and equipment for their communities, etc. The United States as a whole recognizes the need for better health and the medical problems poor health causes not to mention the financial expense but I believe people want to feel good and those willing to make those choices will reap the benefits. The medical profession is beginning to open its eyes to better choices over prescriptive medicines and prevention is a slow process that will take years to become an implementation.

5. Whose responsibility is it to create a well world?

Every one of us is responsible for our own well-being and is responsible to be an example to influence the rest of the world.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

From my vantage point it seems that spa and wellness are finally becoming more integrated in the lifestyle of Americans. In our spa located in New York City, our traffic has increased by 67% over the past year alone. Even though I like to think that we are the best urban spa brand in the US, I cannot attribute this spectacular growth to our talent and attention to details alone.

Something is changing in the mentality of urbanites. They realize that going to the doctor is not only an increasingly disagreeable and expensive proposition but it also means that something happened too late in terms of self-care. Prevention is not perceived as a nice to have reserved for the rich and crunchy people anymore: it is essential to a proper quality of life and longevity.

Spa treatments and approach have also evolved from the pampering for rich ladies of the past to significant and useful treatments that can be integrated into most people's lifestyle.

The combination of these two (long awaited) trends is creating a very positive context and opportunity for our industry

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: broader adoption

Wellness Tourism: attractive travel alternative

Wellness Living Communities/Real Estate: focus on quality of life

Beauty: better client information

Fitness: not just about quantity anymore

Nutrition: basis of healthy living and longevity

3. How would you describe the state of workplace wellness in your country?

I thought, a little naively, that workplace wellness would have taken off by now (2015) and would have been adopted as a priority by most companies. Except for the really progressive (and cash rich) ones such as Google, it has mostly remained wishful thinking. Corporations say that they care about their employees wellness but they send mixed messages to their workforce: we love you and want you to be healthy and balanced, but stay at your desk and work 14h days if you want to be promoted. Employees cannot reconcile these contradictory messages and end up sacrificing their health. If corporations really mean what they claim in their employee brochures, they have to take workplace wellness seriously and create real space for it as well as meaningful partnerships with our industry.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

In the hospitality and hotel industry, it seems like spas are becoming a necessary amenity, even in smaller boutique hotels. This is a positive development except that hotel spas are still being created without real visions and still considered like a painful but somewhat necessary cost to the property. Hotels usually also do not recognize that spa management requires a very different skill set and expertise than hotel management. And that's usually a fatal mistake.

It's also unfortunate that hotels still design their spas as either a "trophy" that should get design awards or a second thought hidden in the basement rather than a useful and complementary offer to their hospitality offer.

In real estate development, the trend towards wellness is still slow to take off and probably where hotels were 15 years ago.

5. Whose responsibility is it to create a well world?

As a politician said a few years ago, it takes a village. In other words it takes leadership from the government and lawmakers, industry leaders and obviously the consumers themselves.

The government has to establish rules that favor building a well world. A great example was New York City's ex mayor Bloomberg that banned smoking in public and most private spaces as well as tried to ban large sugar beverages. As usual in the US, his efforts have been bitterly fought by private interests and lobbies.

Industry leaders and influencers have to set proper examples in their companies and continue the diffusion of reliable and measurable information about wellness and health to the public.

And finally the consumers and the public itself has to demand that wellness and prevention be integrated into their lifestyles. A great example is the increased demand for organic products in smaller outlets that fueled the creation of Wholefood as a major distributor and even incentivize a company like Wal-Mart to create and expand its organic product offering.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

Natural Frequency technologies, halotherapy, recreational oxygen and portion control are trending topics in wellness right now.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Spas have become so democratized people think salons are spas.

Wellness Tourism: Americans aren't as adventurous as Europeans. They like to stay in safe resorts with spas when they do venture out. This hasn't changed much.

Wellness Living Communities/Real Estate: My philosophy is that wellness is in every room of the house. More people are considering the wellness of their homes as they age.

Beauty: Beauty has become like hygiene. If you weren't born with it, you can get it and maintain it with help from the spa or medical spa.

Fitness: Boutique classes have taken off in New York City. People want a different workout every day of the week. From a themed spin class, to SLT, to surf set.

Nutrition: Allergy-free eating is not just for need. People are choosing freely to opt out of gluten, dairy, soy, nuts and more.

3. How would you describe the state of workplace wellness in your country?

The workplace is ill. We need more standing desks, windows, greens, interaction and fun.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The demand for health has doubled since 2011. The number one obstacle to good health is too much stress. The well-being customer is looking for natural help to look and feel healthy. According to the WSL survey “How America Shops® The Wellness Uprising” feeling and looking healthy means different things to different people. Consumers define the healthy lifestyle as balance.

5. Whose responsibility is it to create a well world?

Everyone is responsible for creating their own healthy world and I believe everyone lives somewhere on the health spectrum.

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NORTH AMERICA: UNITED STATES

1. What is currently making news in your country when it comes to wellness or wellbeing?

Current and increasing newsworthy wellness topics within the US include; healthier eating, stress reduction, the need to sleep more and mind-body-spiritual renewal. The millennial generations increasing percentage makeup of the industries consumers and revenues reiterate that wellness is not just associated to indulgences as once seen but as routine; similar to a doctor's visit. The wellness industry as a whole continues to make US news as it encompass more sectors than ever before; far beyond ones potential previous perception of spas or their past offerings. Integrative medicine and alternative wellness therapies continue to blur the lines between medical and spa which are paving the way of the industries' future.

Wellness travel is also becoming more popular and is making the news in the US. Travelers are seeking out wellness retreats and experiences that are tailored towards mindfulness, mind-body-spirit renewal, weight loss, and fitness to name a few. Another big driver of more wellness conscious consumers is technology. Apps, wearables and technology make it easier than ever for wellness to be top of mind in addition to offering information and outlets that you no longer need to see a traditional doctor for keeping consumers engaged and more conscious of their overall health and wellbeing than ever before.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Educational opportunities such as lectures, seminars, and courses are important developments for spas both internally and externally. As today's consumer is more wellness savvy than ever before, authenticity and integrity are top focuses for spas. Providing in-depth and accredited education for spa staff as well as the consumer will position spas as a wellness leader in their market. At the forefront of this movement in 2013, Langham Hospitality Groups proprietary wellness brand, Chuan Spa based on Traditional Chinese Medicine philosophies and techniques

launched Chuan Academy, the first ITEC accredited hotel spa academy both internally and externally with locations found in Langham Place Hong Kong, The Langham Shanghai and The Langham Chicago.

Wellness Tourism: Independent destination wellness experiences have grown in number as well as even specialized wellness tourism travel agents emerging. There is great opportunity in this area for traditional hotels to develop more unique and specialized wellness experiences that can't be found elsewhere to attempt to compete for their fair market share of wellness tourism, a \$439 billion dollar industry that they would not want to overlook according to SRI International.

Wellness Living Communities/Real Estate: The number of residential “lifestyle” buildings and communities have significantly increased as well as the ongoing trend for corporate buildings to renovate and or for new builds to incorporate much more than a fitness center but to include offerings such as massage rooms, meditation rooms, outdoor gardens and walking paths, sleep pods, and healthy dining options within with design and architecture trends being environmentally sustainable.

Beauty: Consumers are more conscious than ever of ingredients and where products are made and sourced. Brands are becoming more transparent about these details, many using their environmental sustainability as one of their sales & marketing strategies.

Fitness: Technology is leading the fitness industry though apps, wearable devices, and equipment that is increasing user engagement and one's ability to take control of aspects of their personal wellbeing while additionally connecting the consumer to insights, recommendations, and instruction on how to utilize personal information obtained through these various fitness technology sources to change and impact their lifestyle.

Nutrition: Consumers consciousness of what they eat has continued to rise as “healthy eating” options and marketing campaigns are seemingly everywhere you turn. Restaurants dedicated to locally sourced ingredients, organic, and environmentally sustainably grown products cover the range from fine dining to quick-service; making the option and choice to eat healthy much easier for today's wellness conscious consumer – at all price points. Many in this sector have begun disclosing nutritional information on their menus and we will see an increase for these businesses as well as nutrition counselors to continue educating people on what they're putting into their body promoting overall health and wellbeing while continuing to help reduce obesity as more than one-third (34.9% or 78.6 million) of U.S. adults are obese reports the Journal of American Medicine (JAMA).

3. How would you describe the state of workplace wellness in your country?

It is one area that has been slow to grow but is currently on the rise and is going to be “the next big thing” as integrative medicine and a la Carte healthcare increase in popularity by demand. Companies need to become creative with the wellness benefits they offer as the benefits reaped impact both the individual and the employer. If employees are living a healthier life, companies will see that it will cut cost in other places such as healthcare premiums, paid sick leave; and not to mention increase productivity. Companies can bring fitness classes into the workplace, better workplace dining options with healthy outlets, and wellness technologies like treadmill or stand up desks. It is an initial expense, however has positive long term benefits as we all work together to build a well world.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

The general attitude is that people are more likely to invest in spa and wellness. We've seen an increase of business up to 30% for Chuan Spa Chicago year-over-year and 22% globally within our brand. Wellness has become a bigger part of consumers' lives like how grocery shopping is part of one's routine. People don't save for it or do it just for a special occasion, it's the way of life for an ever growing percentage of the population.

5. Whose responsibility is it to create a well world?

It is everyone's responsibility; it's up to us all! Those working in and the wellness industry have a heightened responsibility to continue to educate consumers as well as their employees that directly engage with the consumer daily. Through innovation and authenticity of alternative wellness therapies, wellness purveyors must lead this growing industry one step closer to a well world.

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SOUTH AMERICA: BRAZIL

1. What is currently making news in your country when it comes to wellness or wellbeing?

All the economic and political factors, which took place in Brazil in 2014 started to have an impact on the beauty and well-being market, which continued to grow, although at a slower pace compared with previous years. Whilst the business scenario in Brazil is quite pessimistic, beauty and personal care has good prospects. The search for beauty in Brazil has never been so strong, and despite the country's recent economic situation, consumers are not willing to stop their consumption of beauty and personal care products. With less money in their pockets, choices will have to be made, but once consumers have been introduced to and have got used to consuming beauty and personal care products more frequently, they are not likely to take a step back. Beauty services have increased by 567% from 2010 to 2015, according to SEBRAE (Brazilian Service that Support Small Business Companies). The number of gyms has doubled in the last 4 years. Pharmacies are growing too. Pharmacy chains are among top retailers that opened more stores in Brazil this year, attracting big investors like the American CVS Health. According to Brazilian Association of Pharmacies and Drugstores, a 10% growth is expected per year, as there is more space to expand.

2. Please provide one sentence that describes what you think are important developments in your country for each of the following:

Spas: Are diversifying the offerings and expanding the wellness service menu.

Wellness Tourism: The weak currency means that Brazil is now nearly 4x cheaper for international wellness travelers.

Wellness Living Communities/Real Estate: More environmental awareness and sustainability.

Beauty: Services are always on top among Brazilians, with more dermatologists prescribing beauty cosmetics using natural and local ingredients.

Fitness: Personal trainer on demand and functional training (without equipments)

Nutrition: Customization of dairy/gluten free diets.

3. How would you describe the state of workplace wellness in your country?

Companies are more concerned about the health of their employees. Some companies are searching innovative approaches combining technology and new changes in society to provide more wellness for their employees. Some activities include mindfulness meditation, relaxation techniques, lectures on healthy living and family outdoor activities.

4. What has been the general attitude about investing in spa/wellness in your country in 2015? Specific examples?

Economic slowdown starts to impact spa and wellness markets. The “selling Brazil” appeal continues, as consumers look for products with natural ingredients. However, one of the main impacts of the current economic situation on people’s personal and business lives is the high inflation that has lowered the acquisitive power and brought serious problems for the national productive chain. The weak currency is just a consequence and Brazilians are spending their money within the country (which benefits the national tourism destinations). The banks have limited credit lines to both, individuals and companies which reduced the investments in the country. The economic scenario doesn’t look good and now is the time to postpone investments and hold business expansions. It will get better eventually, but tough times are to come before that finally happens.

5. Whose responsibility is it to create a well world?

It is everyone’s responsibility. There are many things we can do to live in a Well World.

Volunteering with a local community is a great way to improve the world around us. Volunteer work allows us to see the impact of our efforts on the people we are helping. Something we can easily do every day is to treat others the way we want to be treated. Do something nice for someone. It can be something small but with a big impact. When we work together, everything runs more smoothly, and we’re better able to further invest the positive results in benefiting the mankind.

Set a good example for friends and family members and help them understand why helping others is important. By changing a few minds in a positive way, you can greatly multiply the positive impact on society. A smile and hopeful attitude can improve the day of everyone around us. By doing such a small thing, we can

positively impact the people we come into contact with. We have lots of opportunities to be nice and helpful to each other every day. It is always good to do someone a favor. Helping people makes us feel better too.

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