



GLOBAL WELLNESS  
SUMMIT // TYROL 2016

GLOBAL WELLNESS SUMMIT  
INDUSTRY BRIEFING  
PAPERS **2016**



## COUNTRY BRIEFING PAPERS 2016

# TABLE OF CONTENTS

### AFRICA

**MOROCCO:** Caroline Bauchet-Bouhlal, Group Development Director, Es Saadi Gardens & ResortChase Webber, Corporate Spa Director, Constance Hotels & Resorts

### ASIA

**INDIA:** Rekha Chaudhari, Managing Director, JCKRC Spa Destination

**INDIA:** Dr. Harish Kalathil, Director Spa & Group coordination and Training, Apeejay Surrendra Park Hotels Ltd

**INDIA:** JC Kapur, Managing Director, JCKRC Spa Destination

**INDIA:** Dr. Talavane Krishna, Founder & President, Indus Valley Ayurvedic Centre

**JAPAN:** Tomonori Maruyama, Manager/Chief Research Consultant, Mitsui Knowledge Industry Co., Ltd.

**MALAYSIA:** Sandra Wong, Chief Executive Officer, Vitulen Sdn Bhd

**QATAR:** Abdulla Hassan Al Mehshadi, Chief Executive Officer, Msheireb Properties

**QATAR:** Tajana Trtanj, Managing Director of Business Developments, CTBA group

**RUSSIA:** Elena Bogacheva, President, Spa and Wellness International Council (SWIC)

**RUSSIA:** Liubov Prigozhina, Owner and CEO and Nina Tsymbal, Spa Consultant, Crystal Spa & Lounge

**SAUDIA ARABIA:** Talal Bin Ali, President & Founder, Enaya Care International

**THAILAND:** Matthew Brennan, Director, Horwath HTL Health and Wellness, Director of Finance, GOCO Hospitality

**THAILAND:** Vanessa Stoessel, Director of Wellness & Spa Projects, MSpa International

### AUSTRALIA

**AUSTRALIA:** Dr. Karen Coates, Managing Medical Director, Cassia Wellness Clinic

**AUSTRALIA:** Sharon Kolkka, General Manager and Wellness Director, Gwinganna Lifestyle Retreat

**AUSTRALIA:** Brook Ramage, General Manager, Peninsula Hot Springs

## EUROPE

**AUSTRIA:** Eva Adamer-König, Chair and Dr. James Miller, Vice-Chair, Institute of Health and Tourism Management, FH JOANNEUM University of Applied Sciences

**AUSTRIA:** Tom Bauer, COO, VAMED VITALITY WORLD

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**AUSTRIA:** Christina Feilmayr, Student in Health management in tourism, FH JOANNEUM University of Applied Sciences

**AUSTRIA:** Chris Keen, CEO and Heinz Schletterer, Chairman, Medical Spa & Wellness Group

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**AUSTRIA:** Lisa Maracher, Director, Ayurveda Resort Sonnhof

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**FINLAND:** Mare Kuruson, Co-founder and CEO, Wellmonde

**FRANCE:** Isabelle Charrier, Founder & Managing Editor, *EMOTION SPA* Magazine

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**FRANCE:** Morgan Lefrancois, International Director of Spas, Clarins

**FRANCE:** Françoise Périer, Journalist, Les Nouvelles Esthétiques

**FRANCE:** Laure-Anne Vilaine, Editorial Advisor, *Palindrome* Edition- AQUAE

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**GERMANY:** Wilfried Dreckman, Spa Project, Managing Director

**GERMANY:** Matthias Voit, Executive Elite Interiors, Dornbracht International

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**HUNGARY:** Dr. Tamas Varhelyi, College Professor, Eszterházy Károly College

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**SWITZERLAND:** Roland Lymann, Lecturer, Lucerne University of Applied Sciences and Arts - Institute of Tourism

**SWITZERLAND:** Martha Wiedemann, Wellness Advisor, Badrutt's Palace Hotel

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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 2016. Please note that these papers are submitted by the authors and have not been edited.*





# Industry Briefing Papers 2016

## AFRICA: MORROCO

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

- Morocco was elected Africa Best Spa Destination 2016 during the World Spa Awards in Italy.
- The newspaper The Economist published the following figure for Morocco's Wellness tourism industry :
  - Growth of 10% in 2016 with 253 million dollars.
- Besides spas, Thalasso Therapy is quite developed especially in cost city as Agadir, and Tetouan.
- The Thermal Station of Mooulay Yacoub in Fes has been entirely refurbished and renovated and has reopened in July 2016. Part of it will be operated by Vichy.
- Since 2015 many Wellness center are involved in the Global Wellness Day. In 2016, 27 Spas in 8 different cities around the country have participated actively.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

A great development of spas in Luxury Hotels all over the country. The competition is producing creativity for amazing spaces and architectural points of differentiations.

#### Beauty:

As always, a strong investment in the latest machines for anti-aging and loss of weight.

#### Fitness:

Increasing awareness of the preventive role of sports and fitness, support the development of numerous fitness center. But too often, for the fitness center in town, not in a Hotel, the level of quality of the offer and services could be better.

**Nutrition:**

A focus on quality of food and organic products is emerging. High level of diabetes in the country enhance a real increase in the awareness on the role played by nutrition in maintaining a good health.

**Wellness Tourism:**

The offer in wellness is increasing and many retreats and packages are being offered by the industry, nevertheless the main reason of coming to the country is still tourism, culture and leisure.

**Wellness Communities or Real Estate:**

Not yet!

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Morocco has a great heritage in wellness traditions and treatments:

Mainly the well-known Moroccan Hammam, scrubs with the glove named “kess” and mud wraps of Ghassoul . A detoxifying and relaxing treatment like no other. Moroccan people have it once a week.

The country is also gifted with endemic presence of argan trees allowing to produce pure and real Argan oil. A real treasure, Argan oil is considered an effective anti-aging oil due to properties such as the high levels of vitamin E /tocopherols (anti-oxidants help neutralize free radical damage, which is important for skin exposed to polluted Western environments) and saponins (skin-softening agents). Besides cooling and soothing inflammation, it is also reputed to help reduce wrinkles by restoring the skin`s hydro-lipid layer.

More recently, the benefits of prickly pear has been revealed and used in facial treatments.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Education is the biggest challenge.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Well-being is a good or satisfactory condition of existence; a state characterized by health, happiness, and prosperity.

Whereas wellness is:

- The quality or state of being healthy in body and mind, especially as the result of deliberate effort
- An approach to healthcare that emphasizes preventing illness and prolonging life, as opposed to emphasizing treating diseases.

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# Industry Briefing Papers 2016

## ASIA: INDIA

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

India is a strongly developing country. The spa & wellness industry is growing in the same pace exponentially. Indian spa industries provide a promising outlook for the global spa industry.

India is currently the 10th fastest growing globally in Beauty & Wellness sector. The industry is poised to reach a size of INR 1,00,000 crores by the year 2015-16. The footfalls in the salons have not only increased but also the business of beauty is witnessing a revolution like never before. In Beauty & Wellness Industry by year 2022 well-being lifestyle is strongly taking place in the Indian citizen mindset, result of this wellness service providers are getting the positive outcome on their heavy investment. This is because of rise in consumer spending capacity, increase in availability of funds and expansion of spas and salons into tier-2 and 3 cities have been growth drivers for the wellness industry.

In the Beauty and Wellness industry in India, only 20% to 30% of the total market share is controlled by the organized players. The rest of the market is unorganized and fragmented with the presence of small and regional players.

Wellness tourism is still not promoted on strong a platform, as India is having a 5000 years old ancient ayurvedic and yoga heritage which is gift by our ancestors which can boost wellness tourism tremendously. The potential of wellness tourism systems, developed through centuries of wisdom, ancient civilization would be fully tapped.

Due to lack of knowledge about wellness industry and unheeding behavior of governing bodies regarding promotion of wellness tourism sector. Improper alignment with industry leaders to understand the real wellness activities thus the growth is impeded.

Predominantly, Wellness, Spa, Beauty, Fitness, Wellness tourism industry are five rising sectors that requires the maximum supply of skilled workforce.

**2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

**Spas:**

Resorts spa is booming with proper wellness concept with heavy investment module. SPA has been increasing Many new thought process of spa has been opening. For example Kids SPA , Technology base concepts in the day spa, Wellness centers, , Salt Escape SPA which claiming that its is a First Salt Spa To Help you to Breathe Better! The numerous day SPA and SPALON (Spa and Salon) concept of spa has been opening every other day.

**Beauty:**

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.

Beauty services at door steps (home services) concept is offered by big chains of beauty salon is also a big change in the beauty industry.

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:**

Ministry of Tourism has drafted guidelines which addresses issues regarding availability of quality publicity material, training and capacity building for the service providers, participation in international & domestic Wellness related events, etc. for the wellbeing of India. As mentioned above wellness tourism can be strong selling key in India. It will be possible if government utilizes maximum expertise's of the wellness industry leaders.

**Wellness Communities or 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 real estate companies. They want to make sure SPA is the neighborhood concept and this can give them more mileage to sale their property.

**3. Our theme this year is “Back to the Future.” What do you feel is your country's most significant contribution to what is now a global wellness economy?**

Ayurveda stands for "Science of life or age" and is the traditional 5000 year old treatment for complete medical system in the world. Its roots lie in the ancient Indian

Civilization and the Hindu Philosophy, and has been an important influence on the development of almost all Medical systems.

Also yoga which is a commonly known generic term for the physical, mental, and spiritual practices or disciplines which originated in ancient India with a view to attain a state of permanent peace. Yoga focuses on holding physical postures that stretches the muscles and limbs. Yoga can be practiced purely for relaxation of the body and mind and can develop flexibility and strength at the same time.

A lot of international tourists come for ayurvedic treatment and for experiencing yoga retreats in India every year.

#### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The challenges the spa and wellness industry faces today are numerous. Many of them are a consequence of the way the sector has evolved in recent years. Although spas becoming main stream are faced with many obstacles, future trends hint towards a more rapid process.

The major challenges faced by the Beauty & Wellness Industry are licensing, paucity of quality skilled & trained manpower, attrition, poaching and consequent high manpower costs , rentals of spas and salons in the Metro Politian cities, wrong practise of competition .

- i. That Cross - gender massage is the loophole which creates opportunity for many evil practices. However, there are many spas in India that offers cross - gender massage treatments to their clients fulfilling all the legal parameters. But a single unfortunate incidence degrades the image of overall spa industry in India. This exploitation and harassment makes the staff demoralized. Young and talented individuals and their parents hesitate to send their children to enter in this field although it has a lucrative career which is affecting the development of the wellness industry for the talented manpower. The guests (clients) start measuring the entire spa and massage parlors on same scale, therefore families confined themselves to visit spas and salons. Due to lack of awareness in all strata's of the society, shady places working under the name of massage parlous giving a bad name to the profession & industry.
- ii. The consolidated formal law or regulation for this industry in India is needed on the prior bases.
- iii. Another challenge is lack of conformity to quality standards across the Industry which restricts to let us project the image of India as a high-quality wellness destination.



- iv. Beauty & Wellness is a domain which employs more women than men and also presents them the scope to turn entrepreneurs in their own right.
- v. The current scenario, due to numbers has been increasing in the day spa, crisis has raised another problem: many spas have cut their costs dramatically without reducing their prices. This not only endangers consumer confidence but also jeopardizes customer loyalty towards our industry. It is essential to figure out what the client is looking for (relaxation, health, leisure, etc.), and to understand whether all these services can be offered under a specific spa model.
- vi. The single biggest challenge is the shortage of trained manpower. The Ministry of skill development is helping for skilled labor force but the industry is still not able to get skilled manpower due to lack of training institute in the spa. Lack of standards, lack of accredited training institutes, lack of accredited spas, lack of uniformity in traditional treatments, treatments differing,
- vii. Non-sharing, discreet & orthodox attitude of some ayurvedic practitioners not wanting ayurveda to be used in the spa industry. Many practitioners looking at ayurveda as a Therapeutic modality rather than lifestyle management modality, non-standardized products.
- viii. SPA retail is down as consumers are more careful with their money but at the same time there is lack of awareness for the professional product segment. Hotel, Spas and Day spas reporting an increase of 15-20% in sales so far. This is due to business men travelling internally frequently.
- ix. Lack of Government support - Government should develop and promote medical tourism and wellness tourism separately.
- x. Industry is not working together, which is again a big challenges for the leaders, as everyone is working there - one end result is more than growth, grouping of associations is increasing. No avenues to address issues & grievances of the industry. Lack of government support in promotion of industry except in few cases.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

In India well-being has been taught from child hood in the beautiful shloka, “Subham karoti kalyanam, arogyam dhana sampadah” meaning of shloka I pay my salutation (namaskara) to the light / lamp which brings auspiciousness, prosperity, good health, abundance of money and wealth, and the destruction of the intellect’s enemy)to make your mind, body and soul spiritual strong for well-being Social-Emotional Well Being is keeping person fit by all aspect. The Building Blocks for Early Learning of your life. The period of early childhood sets the stage for how well children view themselves, each other, and their world. Shared positive emotional experiences

between caregivers and children serve as building blocks for the development of social and emotional well-being of society. Incorporating the three principles of promotion, prevention, and intervention within a systems framework (child-parent-environment) will enable early childhood practitioners to encourage the emotional health and well-being of all children and families.

Well-being is a complex construct that concerns optimal experience and functioning.

Wellness not only consists of physical health, but emotional and spiritual well-being too. Wellness approach is useful in nearly every human endeavor. As a pathway to optimal living, wellness encompasses of health promotion and holistic health, and has seen a growth in "helping professions" including counseling and medical arts and practices. The concept of wellness has become a globally accepted phenomenon. Indian traditional yoga, interestingly, has become the favorite flavor and an importantly integral part of all wellness spas, centers. With the help of holistic wellness approaches that include yoga, meditation, ayurveda, homeopathy, pranic healing, chakra therapy, aura cleansing, and more, these centres offer packages like weight management, wellness bliss, yoga, ayurvedic rejuvenation, fitness and stress management.

Well-being includes physical health, but it also includes additional key aspects of our lives such as Emotional, Psychological, Mental and Intellectual health. Social and Community health, where there is a sense of belong, are often included. Spiritual health is also often inserted into the conversation, mind and spirit is used to demonstrate the scope of well-being. Well-being included overall state of man Financial health, professional, occupational, Environmental and economic well-being into the mix

For example, higher levels of well-being are associated with decreased risk of disease, illness, and injury; better immune functioning; speedier recovery; and increased longevity. Individuals with high levels of well-being are more productive at work and are more likely to contribute to their communities. Realizing the benefits of well-being on productivity in the workplace, many employer sponsored wellness program now give attention to the holistic needs of employees. Employers often provide training on dealing with stress, in and out of the workplace; lunch and learns on financial wellness; opportunity for community involvement and volunteerism and so on.

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# Industry Briefing Papers 2016

## ASIA: INDIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

In India slowly but surely the concept of Spa has become a part of daily life. Spa visits are not considered a luxury anymore. Well-travelled Indians have become more discerning and appreciative of good spas and services.

More interest has been shown by the government in encouraging entrepreneurship in the field of spa & beauty as well as fitness.

Skill development initiative by the Government has also addressed the lack of skilled staff in Spa & beauty sector.

More destination spas have come up in India with unique and ethnic offerings. They have relied upon local culture and tradition to make their offerings unique and world class. Lot of interest and enthusiasm visible in the field of fitness in big as well as smaller cities. This awareness can be attributed to the endorsement of fitness by the popular stars of Hindi movie industry.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Many standalone spas have become unviable & only the ones with concrete foundation in training & process have survived. Still many standalone spas are coming up.

#### **Beauty:**

Government has become stricter on the products being used and all cosmetic approvals have been brought under the drug approval agency.

#### **Fitness:**

Big awareness amongst the young and old alike. All forms of fitness modalities being practiced in India.

**Nutrition:**

Eat right to lose weight and stay fit is the trending subject rather than dieting.

**Wellness Tourism:**

More avenues to experience Ayurvedic and traditional therapies now not exclusive to southern state of Kerala.

**Wellness Communities or Real Estate:**

Though a dedicated wellness focused community is not a trend, high awareness among gated communities to give lot of dedicated spaces for fitness and greenery.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Ayurveda and Pancha karma treatments.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Academy level education for the therapists and managers in the spa. The biggest challenge that India face is its ever growing population. The discussion of wellness and health is still confined to a minor percentage of the population. When awareness of staying healthy and healthy eating improves among the young population of India, the wellness economy will make leaping progress.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness is a state of healthy body and mind due to healthy living practices.

Well- being is a state of mind encompassing not just the happiness and contentment of one individual, but his/her environment and what that consists of!

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**THE**  
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Hotels



# Industry Briefing Papers 2016

## ASIA: INDIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

The spa & wellness industry in India is growing by leaps and bounds as the awareness and spending capacity of people metro cities of India is growing. Changes in lifestyle and consumers becoming more health conscious are primary factors that have added to the growing demand for not just services but health products too. So there is a lot of opportunity for the start-ups to fill this gap.

The current government has been showing keen interest in the spa & wellness industry. It has in fact set up a separate ministry called AYUSH (Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homeopathy) which is bringing a boom to spa industry. This has opened newer avenues for investors now eyeing the ancient forms of wellness as a huge opportunity. Besides Yoga is made free of service tax. The wave of Yoga has been riding high on.

The 'wellness hotel' and the move beyond 'just spa offerings' is more into holistic and transformational experiences away from home.

Wellness is now a core part of the modern day tourist's ideals and, as far as the high-end hotel chains and the tourism industry as a whole is concerned, is no longer considered a luxury but rather a necessity. The Westin, by example, introduced an entire 'Well-being Movement' – a global initiative which inspires guests to discover new approaches to wellbeing.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Spa has started adopting technology based on concept of non-surgical equipment for reshaping body. With the global and media exposure many people today, looking good is equivalent to feeling good that's why they prefer body slimming therapies, non surgical face lifting 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.

### **Beauty:**

Not only have salons increased their footfalls, the business of beauty is witnessing a revolution like never before. Exclusive skin care brands opening stores on high streets and malls to at-home beauty services are catching the attention of investors. Not only international names are now in the country, the community of investors have also grown and they are whole-heartedly supporting start-ups, at-home beauty services and developed e-commerce sites. The year 2016 marked the year of business development and one that has set the pace for expansion for those involved in beauty and wellness.

### **Fitness:**

Yoga, an invaluable gift was originated in India in ancient time 5000 years back when people were used of meditation to transform their body and mind. It brings harmony between man and nature; a holistic approach to health and well-being. Indian experience revolutionary movement when United Nations General Assembly adopted 21st of June as an International Yoga Day to get all the benefits of yoga for the people all around the world. The celebration of the event International day of yoga is supported by various global leaders. It is celebrated by the people of more than 170 countries India is on the urge of spreading awareness of yoga from school level itself.

### **Wellness Communities or 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. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

In India the age old Ayurveda or ayurvedic medicine is a system of traditional medicine native to the Indian subcontinent and a form of alternative medicine. Ayurveda stands for "Science of life or age" and is the oldest form of complete medical system in the world and dates back to 5000 B.C. Its roots lie in the ancient Indian Civilization and the Hindu Philosophy, and has been an important influence on the development of almost all other Eastern Medical systems.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The challenges the spa and wellness industry faces today are numerous. Many of them are a consequence of the way the sector has evolved in recent years.

- The biggest challenge is the shortage of trained manpower.

- Industry is not working together, which is again a big challenges for the leaders, as everyone is working there - one end result is more than growth, grouping of associations is increasing.
- Main problems for the licensing and other big issues are still not solved.
- No avenues to address issues & grievances of the industry.
- Lack of awareness in all strata's of the society, shady places working under the name of massage parlour giving a bad name to the profession & industry. Non-sharing, discreet & orthodox attitude of some ayurvedic practitioners not wanting ayurveda to be used in the spa industry.
- Lack of standards, lack of adequately trained manpower, lack of professionals serving the wellness sector and lack of proper education.

**5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of "wellness" and "well-being" in your country.**

The concept of wellness has become a globally accepted phenomenon. Wellness consists of physical health, but emotional and spiritual well-being too. Wellness approach is useful in nearly every human endeavor. It encompasses of health promotion and holistic health, and has seen a growth in "helping professions" including counseling and medical arts and practices. Indian traditional yoga, interestingly, has become the favorite flavor and an importantly integral part of all wellness spas, centers.

Well-being included overall state of man i.e. Financial health, professional, occupational, Environmental and economic well-being into the mix. Wellbeing is a growing area of research, yet the question of how it should be defined remains unanswered. This multi-disciplinary review explores past attempts to define wellbeing and provides an overview of the main theoretical perspectives.

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# Industry Briefing Papers 2016

## ASIA: INDIA

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

In India, Spa has emerged as one of the fastest growing industry after America and Europe with the quarter of the last decade having seen a growth of 14 -16 per cent; the reason being their substantial expansion in travel and tourism industry as well as a rise in income which has made them more aware about the quality of life. Health is Wealth is the new catchphrase, and nothing can be more beneficial for unwinding and healing strained nerves than natural therapy of a spa. Hence, the health conscious class is consuming spa like never before.

#### Growth of Spa

Region wise, north India is doing well with its stable rate of economic growth in comparison to other regions. In west, Mumbai being a land of Bollywood and corporates and an established land of tourism is contributing a big chunk to the economic prosperity.

In south, Tamil Nadu, Kerala and Karnataka complete the picture. Moreover, Kerala has put India on the World economic map as a mecca for tourists and locals alike because of its Ayurvedic flavour. It recently won Asia's best travel destination award.

Interestingly, the booming industry is also attracting branded spa operators to India. According to a recent piece of news from Red Door, the American spa major, "The rate at which the hospitality industry, specially the five-star hotels are growing, and increasing demand for tourism, thousands of years of culture of well-being (Ayurveda), right demographics, younger population (highly educated and affluent)—all contributed to our decision of entering India".

Medispas are the newest thing attracting people. Some spas have yoga centres and gyms while others are doing Botox and Laser treatment for weight reduction with qualified doctors.

#### Accreditation of Spas

Since, the sector is still largely unorganized, hygiene and quality is a matter of big concern. Therefore, accreditation becomes important so that wheat can be

separated from chaff and people can know the category of the spa they are visiting. National Accreditation Board for Hospitals and Health care providers (NABH) has launched a programme for accreditation of wellness centres like gyms, spas, cosmetic and skin treatment centres in the country.

### **Future investment**

According to ASSOCHAM, the Indian spa industry which is offering a mix of traditional Ayurvedic as well as Chinese, Thai and Swedish healing techniques is expected to receive investment of US\$ 35 billion in the next 3-4 years.

### **Franchise opportunity**

In India spa franchise is becoming hot market with profit margins in the industry as high as 60-65 per cent. With an increasing number of people becoming aware of the advantages of spas, there is an increase in the number of franchised outlets as well. In India people today patronize branded spa outlets rather than availing spa treatments from unorganized salons and spa centres as the franchised spa salons offer highly specialised professional services and treatments through advanced technology to its customers. Therefore, the various branded salons and spa centres in India adopting the franchise route to expand their businesses for high growth rate. Due to high profit margin and existing customer base of established brand its being a trend for Indian investors to take franchisee of famous Indian brands like - VLCC, Vibes, Strands Salons, Habibs, Ora - Regenesi spas, AURA - Thai spas, Four - fountain spas, Orient spas, Serena spas, Lavana spas. Ananta spas, Blossom Kochhar aroma salons, Shahnaz herbal salon etc.

### **Parallel beneficiary markets**

The Industry has given impetus to a glut of markets of light fittings, music equipment, furnishings, furniture, bathing tubs, electrical equipment like steam, cosmetic, fragrances, sanitation, toiletries etc. Also, the architects are seeing boom in their creativity like never before.

Medical tourism is a growing sector in India. India's medical tourism sector was estimated to be worth US\$3 billion. It is projected to grow to \$7-8 billion by 2020. According to the Confederation of Indian Industries (CII), the primary reason that attracts medical value travel to India is cost-effectiveness, and treatment from accredited facilities at par with developed countries at much lower cost.

Traditionally, the United States and the United Kingdom have been the largest source countries for medical tourism to India. However, according to a CII-Grant Thornton report, Bangladeshis and Afghans accounted for 34% of foreign patients, the maximum share, primarily due to their close proximity with India and poor healthcare infrastructure in those countries.. Russia and the Commonwealth of Independent States (CIS) accounted for 30% share of foreign medical tourist arrivals. Other major sources of patients include Africa and the Middle East, particularly the Persian Gulf countries. In 2015, India became the top destination for Russians seeking medical.

**2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

**Spas:**

Becoming wellness centre, joining hands with hospitals (Apollo joined hands with Sangvi spa brand), Apollo has launched White dental spa clinic.

**Beauty:**

More medical approach

**Fitness:**

Middle & elderly people are more involving into fitness.

**Nutrition:**

Moving towards organic.

**Wellness Tourism:**

Best emerging market in Asia.

**Wellness Communities or Real Estate:**

Real estate & wellness coming under one roof to provide healthy lifestyle. Like Jaypee real estate group has joined hands with Six Senses Spas.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Indian Head massage (champi) , Holistic ayurvedic therapies( Abhyanga / shirodhara many more..)

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Mind set of male to male & female to female therapy. Proper awareness among middle class people. Passive approach of investors.

**5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of “wellness” and “well-being” in your country.**

**Wellness:**

Wellness is an active process of becoming aware of and making choices toward a healthy and fulfilling life. Wellness is more than being free from illness.



**Well-being:**

Well-being is a term for the condition of an individual or group, for example their social, economic, psychological, spiritual or medical state.

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# Industry Briefing Papers 2016

## ASIA: JAPAN

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Tourism from abroad is one of the few promising businesses in Japan. According to the Japan National Tourism Organization (JNTO), foreign visitors to Japan doubled in last decade and reached 10 million people for the first time in 2013, led by increase of Asian visitors. In 2008, the Japanese government has set up Japan Tourism Agency and set the initial goal to increase foreign visitors to 20 million in 2020. In 2016, having met the 20 million target, the government has revised up its target to 40 million by 2020 when Tokyo hosts the Olympic Games. It requires an average growth of 19% per year for the next 4 years.

Japan Tourism Agency (JTA) reported that Over 75% of foreign tourists expect to have healthy Japanese cuisine and about 30% of them expects to experience Onsen (hot springs bathing). It definitely would be a great opportunity for spa and wellness tourism industries in Japan while this country is struggling with decrease in domestic population.

Additionally, by using White Paper of Leisure 2015, Economic Census 2014 and Onsen Utilization Report 2014 (Ministry of Environment), market size of Onsen as of FY 2014 can be roughly estimated 1.07 trillion yen (= about 10.5 billion U.S. dollars) which has increased by 34 percent from 2011. In like manner, by referring Annual Report of Service Industries Survey 2015 (Statistics Bureau) and the past Spa Services Surveys commissioned by Ministry of Economy, the annual turnover of spa services in Japan as of FY2015 can be estimated about 738 billion yen (= about 7.2 billion U.S. dollars) which has increased by 30 percent from FY2006 despite we experienced 2 times of severe damages in this decade such as the financial crisis in 2008 and tsunami caused by the Great East Japan Earthquake in 2011.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Encouraged by the strong trend of inbound tourism, we can see a stream of development plans and newly opened hotel spas all over the nation. Especially, some

prestigious Japan brands are opened in 2016 such as Hoshinoya Tokyo, The Prince Gallery Tokyo Kioicho, The HIRAMATSU Hotels & Resorts Kashikojima island and THE UZA TERRACE BEACH CLUB VILLAS. On the other hand, so many foreign hotel brands are going to be launched from 2017 to 2020 including 5 Marriot hotels (Karuizawa, Biwako, Izu-shuzenji, Fuji, Nanki-Shirahama), JW Marriot Nara and 2 Four Seasons Hotels (Kyoto, Otemachi in Tokyo).

#### **Beauty:**

Recently, hydrogen water products are dominating some beauty trade shows in Japan. Many of consumers believe it has a great effectiveness to protect from aging by antioxidant effects. On the other hand, almost of all electric appliance retailers set up the space only for beauty home appliances as it's very popular among many foreign tourists from Asian countries.

#### **Fitness and 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.

#### **Wellness Tourism:**

Ministry of Environment (MOE) has just launched a so-called "Onsen Office" (Hot Spring Conservation and Use Promotion Office). This is the first time for the ministry to set up such an official office which is dedicated in Onsen promotion only though they have been designated People's Recreation Spas along with Onsen Hot Springs since 1948 and 94 sites had designated today. Thanks to them, everyone can access to genuine wellness resorts fulfilled with the national standard including (1) excellent quality & volume of hot springs water, (2) with bountiful natural environment, (3) supported by medical doctors who has the expertise of balneo-therapeutics etc. In order to educate people how to use Onsen effectively, MOE also provide the guidebook with research evidence on the balneo-therapy.

#### **Wellness Communities or Real Estate:**

With universities, farmers, hospitals, nursing care institutes, tourism related companies and municipalities, the Ministry of Economy set up 21 regional committees for creating innovative business to solve the health issues related with aging of population in each region including committees for creating healthcare services in Hokkaido (including agricultural wellness etc.), for bridging global wellness in Okinawa Island (with utilizing regional natural resources including sea minerals, regional flora and fauna etc.), for Kurort walking wellness in Yamagata prefecture, and so on.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

“Onsen - hot spring bathing”, “Zen - meditation & spirit training”, “Shiatsu - traditional treatment”, “Japanese cuisines - genuinely healthy food” are the key wellness drivers and those have been brought significant contributions not only for Japan but also for the global wellness economy.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

To spread and familiarize the wellness activities at the workplace would be the biggest challenge because Japanese are well-known as workaholic characteristic. Since 2014, Ministry of Economy and Tokyo Stock Exchange have been designated 25 companies as “Corporate Health Achievement Award Winners” from listed 3600 enterprises every year, in order to stimulate investors for wellness oriented companies. (\*US have been conducting similar activities for S&P 500 companies.) This activity is based on the international theory propounded by “The Healthy Company” written by Robert H. Rosen (1992).

**5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of “wellness” and “well-being” in your country.**

There are some organizations related with “wellness” and “well-being” in Japan such as Japan Wellness Foundation, Wellness Japan, Japan Wellness Society, NPO Well-Being etc. And many of them follow the terms/concepts advocated by WHO. However, almost all Japanese people cannot distinguish or tell about terms/concepts of them accurately.

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# Industry Briefing Papers 2016

## ASIA: MALAYSIA

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

While Asia-Pacific is the fastest-growing region for wellness tourism, with more than 200m wellness-related tourism trips in 2015, Malaysia is a laggard in the spa and wellness industry. Malaysia aims to create 3,540 jobs with a gross national income of RM374.1m (\$92.6m) by 2020, under its plans to develop the industry as part of the tourism national key economic area. Training programmes are encouraged and rating agencies as well as the Malaysian Association of Wellness and Spa have been set up for self-regulation and credibility. Many of the spas are attached to luxury hotels and resorts, and the country faces stiff competition from our more established neighbours such as Thailand and Indonesia. Currently, this industry is targeted mostly at tourists and the local elite. There is huge potential to establish retirement homes due to the relatively lower cost of living. Khazanah, which is Malaysia's equivalent of a national wealth fund as well as several developers both local and foreign have identified and are exploiting the potential to develop wellness and retirement communities. Malaysia is a developing country that is expected to reach the ageing population status by 2035, where 15% of its total population would be 60 years and older, posing a huge socio-economic and health problem for the country. More than half of those would not be able to sustain a healthy lifestyle due to lack of savings.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

High growth industry facing challenges in recruitment of qualified technicians and personnel.

#### Beauty:

The establishment of clinics offering modern aesthetics treatments by medical personnel enjoys high growth challenging spending on traditional facials and slimming salons.

#### Fitness:

There is nothing worthy of mention here.

**Nutrition:**

Majority of Malaysians generally have poor diet leading to increasing incidence of diabetes- 3.5 million or 17.8% of its population above the age of 18 were found to be diabetic in 2015.

**Wellness Tourism:**

This is a key target of both the government and private sector which recognizes the potential of this industry that has been growing at more than 10% in recent years.

**Wellness Communities or Real Estate:**

Retirement and assisted-living style communities, aimed at the elderly represent an untapped market with significant demand generated both locally and the Asia Pacific region due to the relatively lower cost of living in Malaysia and availability of real estate.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Traditional herbal remedies are gaining scientific proof to be safe and efficacious for addressing various health issues.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The lack of qualified and trained personnel in both the spa and wellness industry is the biggest constraint to growth.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness addresses the deeper holistic health issues of an individual while well-being addresses the social economic and lifestyle of an individual.

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# Industry Briefing Papers 2016

## ASIA: QATAR

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

1. At a general level, the development graph of Qatar, has been one that has climbed steeply; the country has achieved in a couple of decades, what others would have taken much longer.

2. Driven by the country's Leadership and a growing market, Qatar's Wellness industry is poised to grow at a double-digit rate over the next five years, with certain sectors, such as Wellness and beauty treatments, projected to grow at more than 35-40%. The growing wellness industry has attracted a number of domestic entrants and international players.

3. Evolving lifestyle trends are changing the Qatari mind-set, and a great deal of importance is now attached to Wellness. While, health foods and drinks and tonics have traditionally been integral to a healthy diet, people are now increasingly looking at new avenues of Wellness. In order to maintain and improve their Wellness, they engage in activities such as regular exercise, massage therapies and counselling.

4. A renaissance is also being witnessed on the traditions of Islamic Wellness, which is indigenous to the region. In the Middle East the Wellness culture was dominated by the medical aspects- however, the philosophy is shifting towards the more spiritual and lifestyle approach. Qatar has been announced as the host country for the World Tourism Day in 2017. Events to be held as part of this will also benefit the Wellness initiatives being promoted.

5. Modern concepts like stem cell based therapies for a wide range of conditions are also being researched on at institutions like the Qatar Biomedical Research Institute (QBRI). Another organization that is playing a major role in delivery of Healthcare and Wellness initiatives is SIDRA, which has recently commenced operations of, what will eventually be a leading medical facility in the region. Both, SIDRA and QBRI are entities with the fold of Qatar Foundation, which has been spearheading human development in the country for more than a decade now.

6. The Wellness travel & Medical Tourism segment is also growing as shown by the advent of specialist tour operators. The packages in vogue with Qataris currently are primarily related to Lifestyle Management and Wellness Treatments which are provided out of destination markets in Europe, India and the Far East. Catering to the needs of fitness-conscious travelers, companies have also started offering packages that combine health routines along with the tourism packages. These packages include yoga holiday, detox holidays, beach spa holidays, and luxury trips that make wellness a priority.

7. The other important fact that needs to be considered is - in 2013, about 3,160 Qataris were sent abroad for medical treatment and the resultant expenditure borne by the state was around US\$ 609 Million. The Government is increasingly promoting initiatives on Wellness to curtail this expenditure with the target being to prevent illness rather than cure. Qatar is faced with critical public health challenges, with over 60% of deaths caused by chronic diseases, injuries, and congenital diseases, driven by risk factors that are largely preventable. A shift in the current healthcare system's focus from management of illness to more proactive prevention and early detection of ill health will be crucial to the success of the National Health Strategy.

8. The Primary Healthcare Corporation is has recently opened at facility and two more are scheduled to open within a couple of years. The larger wellness centres will include facilities such as a swimming pool, massage room and gym to help Qatari people, especially children and families, live healthier lives.

**2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

**Spas:**

The 'now' culture and fast paced life in the Middle East means clients want to see instant results and specialist spas are beginning to offer cosmetic, dental, laser, and Botox treatments alongside traditional spa therapies.

**Beauty:**

The Doha Beauty Show (scheduled in October 2016) is the first of its kind event in Qatar that is dedicated to local and international trade and beauty professionals as well as local consumers.

**Fitness:**

Increasing awareness of the role played by fitness practices in maintaining Health & Wellness has led to double digit growth in fitness industry revenues (pegged at US\$ 65 Million as of 2015).

**Nutrition:**

Consumers are becoming more attuned to the importance and value of green, eco, sustainable and organic practices and products - this is also signaled by the emergence of health food ventures in Qatar.



### **Wellness Tourism:**

The emergence of certified Health and Wellness facilitators and growth in the number of people opting for Spa-cations- entire weekends are now being created as retreats that deliver a spa journey tailored to meeting individual needs of the mind and body.

### **Wellness Communities or Real Estate:**

Under the patronage of the Leadership, a new world class Destination Spa and Wellness Resort is being developed - due for completion in 2018, this will signal the advent of Destination Spas to the GCC.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The Leadership in Qatar, has been at the forefront of comprehensive reforms to provide all Qataris with access to world-class facilities for Health & Wellness. Under their stewardship, pioneering research was initiated to commence development of a world class facility that will provide both, dimensions of the health tourism spectrum, including therapeutic treatments & diagnostics of the medical end and high-quality beauty and pampering treatments of the wellness end.

On completion, this will turn out to be a centre of Excellence. At the core of its offer are wellness programs: a carefully crafted set of services, treatments and activities that are designed to deliver a particular wellness solution, such as weight-loss, detoxification, or mental balance. These wellness programs will reflect the inner values of purity and personal discipline. The programs will integrate today’s leading wellness practices, such as medical diagnostics, fitness, or nutrition, with the wellness traditions of Islamic regions identified in research.

Qatar, an Islamic country, is also poised to be a major center for inbound Halal Tourism with the development of many of the infrastructure projects currently in the pipeline. On completion, these projects will enable Qatar to carve a niche in the Halal Tourism market, estimated to be around US\$ 142 Billion in 2014.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Effective evolution and implementation of policies in this area will require a paradigm shift in mindsets – a change that will require people to think that fundamentally, Wellness / Health is not signified purely by absence of disease. This line of thought is incorporated into the National Vision 2030 and will hopefully propel the country forward in the right direction.

Applying a wellness approach can be useful in nearly every human endeavor. Currently, the approach to Wellness in Qatar is reactive rather than proactive. The

growing incidence of chronic lifestyle related diseases in Qatar and the wider GCC region is evidence towards this -16% of Qatar's adult population has diabetes, while 77% are overweight or obese. Qatar could reduce its morbidity and mortality through the promotion of wellness.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellbeing is considered to indicate absence of health problems. Wellness on the other hand has a more “preventive” connotation.

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# Industry Briefing Papers 2016

## ASIA: QATAR

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Qatar is moving forward very strongly in wellness industry with goal to attract sport & health tourist. Wellness and SPA projects are going hand in hand with overall goal; healthy nation. New concept of wellness hospitals & wellness hotels is great example of how government takes our industry very seriously. Unfortunately, Qatar has one of the highest percentage in obesity and diabetes in the world and trend is to promote and support healthy lifestyle-seminars, state of the art hospitals and Sport day as national holiday is just short example of what is trendy in Qatar.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

Major hotel groups and interesting SPA brands are opening in 2017.

#### Beauty:

never ending trend in Qatar; hair & nail salons are always busy but major trend is quick fix – Botox, fillers, lasers...

#### Fitness:

new gyms and group trainings are booming in Qatar; just in 2016. we have 5 big gym's opened and each residential building has their fully equipped gym & pool. Downside is; that personal trainers without diplomas or certificates are flooding the market, using residential gyms as their own working place, what lowers PT price for registered trainers in official fitness centers (as we have higher overhead our prices are higher) some actions from side of government will be taken in terms of inspections and control but did not start yet.

#### Nutrition:

Diet centers are everywhere, registered, with nutritionists and chefs they are delivering food to your home or work address, big trend is detox.

### **Wellness Tourism:**

unfortunately, with all effort that government is implementing people still don't understand wellness so to find special wellness offers in hotels is rare.

### **Wellness Communities or Real Estate:**

many are in opening or final construction phase. There are interesting on line sites that promote healthy lifestyle such is

<http://www.eventsdoha.com/category/activities/fitness-classes/>

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Qatar is one of the first countries in the world that offers free DNA sequencing for all Qatari families. As part of big biobank project along side with state of the art Sidra hospital Qatar is taking preventative medicine one step further. DNA Wellness project is already alive and kicking, launched in January 2015 as D/Code, this wellness program is offering their clients personalized packages based on DNA test; all with effort to help changing lifestyle of majority residents and for healthier future.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

As results of GWI survey showed ; 90% of middle east population considers wellness as luxury beauty treatments. Greatest challenge is to educate people and change their perception as well as lifestyle habits that led to high obesity and diabetes. Other challenge is categorization as there is no official definition of Wellness, SPA and beauty salons ; big wellness centers that want to include nutrition, doctor and same time offer massage & beauty treatments; can't register as wellness. Today you can only register SPA or hair salon there is no other category. Hotels do not have that problem.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

As GWI study showed; middle east still struggles to understand wellness concept.

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# Industry Briefing Papers 2016

## ASIA: RUSSIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

With quite a large number of new hotels and wellness destinations appearing in Russia (over a thousand hotels between 2010-2013), we are witnessing now a serious shift to domestic wellness tourism. There is a strong demand for medical wellness programs among local tourists, their number growing by 10% per year. Russians are getting back to the old tradition to spend the vacations in health resorts (sanatoria) on the Black Sea coast and in the Northern Caucasus region. Within the past few years Russia has demonstrated amazing statistics which made it the second country in Europe by the hot springs market. Almost all of the 2000 sanatoria offer modern spa and wellness treatments. Local developers and state officials are no longer doubting when it comes to investing in spa /wellness hotels, and the government has made official statements in favor of restoring the culture and practices of health resorts.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

A few domestic spa operators have appeared in the Russian market within the past two years. National standards for spa services are available, and elaboration of professional standards for spa therapists is underway. There are several projects of classical thermal spas in the South of Russia. Three on-line education courses for spa therapists and spa managers have been launched in 2016.

#### **Beauty:**

The majority of Cosmetology treatments can no longer be administered without a medical license. Any beauty salon or spa that offers facials other than product applications or massage, has to employ a full-time MD. There is a growing demand among Russian clients for the micro pigmentation treatments, and the number of «permanent make-up salons» is quite impressive.

#### **Fitness:**

For several decades serious fitness operators have been dominating in the market. Now time has come for «budget» fitness clubs, available to broader layers of population. A recent example of tremendous success is the «Fizika» chain of clubs established in partnership with «Technogym», with hundreds of workout machines in modern facilities at a very low monthly fee. However, yoga studios clubs are leading both in numbers and popularity among Russian clients.

#### **Nutrition:**

The current trend among wellness-aware Russians is buying organic food «Farmers'» shops and markets as well as healthy menu delivery systems. There is quite a large number of wholesome food suppliers, some of them offering food deliveries on a subscription-basis. One can pay for a relatively inexpensive subscription and get a weekly supply of organic food from local farmers. Nutrition and culinary classes are extremely popular, and almost every TV channel is offering programs «Cooking at home».

#### **Wellness Tourism:**

Every fifth Russian tourist has chosen a wellness destination for vacations in 2013. Over 8 million wellness tourists have travelled to domestic destinations, while only about 3 million people have preferred to go abroad to spa and wellness resorts. The majority of primary wellness tourists are still with the age span of 45-60, going to traditional health resorts, whereas younger generations are rather interested in popular international wellness destinations.

#### **Wellness Communities or Real Estate:**

Wellness Community is still a «terra incognita» in Russia but the real estate developers are gradually addressing the issue. Residential spas in elite condominiums have become quite a current phenomenon. There are several Spa salons in the Moscow City Towers, and a few more projects being developed. But the demand for spa apartments and residential spas is not so high at present.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Traditional Russian Banya is on the agenda- both worldwide and for the Russian population. The rituals and technologies of the Russian steam bath are backed by strong scientific evidence. Russian balneologists are investigating deeply in the healing properties of hot humid steam experience. The global wellness community is sure to put Russian Banya on the list of «must-haves» for spa-goers and wellness tourists in the nearest future.



**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The ever-lasting opposition between the new generations of spa/wellness professionals and the official healthcare institutions is a key obstacle to the new developing wellness market. The current regulations in the domain of healthcare ban the majority of alternative medicine methods, and wellness professionals have to offer some of their services illegally.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

The notion of wellness is largely misunderstood among physicians and MD practitioners and often mixed with or replaced by the term «medical rehabilitation». Wellness is largely understood in Russia as a «foreign concept» rather referring to fitness and spa than to well-being and overall health. However, events like Global Wellness Day and Spa and Wellness International Congress held in Russia help to raise the level of interest in the society to the notion and meaning of wellness.

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# Industry Briefing Papers 2016

## ASIA: RUSSIA

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

While on a working trip to the Altai Territory in Siberia, on 26th August the Russian president Vladimir Putin chaired a meeting of the State Presidium Council on measures to enhance the investment appeal of the health resort sector in Russia.

It is believed that regular treatments at health resorts can increase a life span by 3 to 15 years. to date, there are 1,875 resort organisations in Russia. Nearly 46 percent of facilities at state resorts are idling. The renovation and modernisation of the existing resorts will cost about 37 billion rubles. It is obvious that we need a comprehensive and well substantiated strategy for the development of the country's health resort complex, with state funding priorities and a procedure for attracting private investment.

The history of Russian health resorts started almost 300 years ago, when Tsar Peter the Great ordered a search for mineral waters in Russia. In 1719 the first Russian mineral spring spa "Marcial Waters" was established in Northwest Russia. The principles of kurortology (curative science) were established in Russia in accordance with best Eastern European resort models.

In Russia there are all types of mineral waters, all climatic zones and there are resorts with no equivalent abroad. Unique nature combined with effective treatment methods used at modern Russian resorts is a solid foundation for enhancing their competitiveness and increasing demand for them in Russia and internationally.

The spa and wellness concept is becoming trendy and therefore, the modern resort sector of the market is already rapidly growing, which is demonstrated by the number of new investment projects, which have either recently been proposed or are already in progress. Several projects of a high international standard have been built or redeveloped in the Krasnodar region (and particularly in Sochi), which hosted the Winter Olympic Games in 2014. Among them include "Grand Hotel & Spa "Rodina"" 5\* (Sochi), the all-inclusive "Riviera Club Hotel&SPA" 4\* (Anapa), Hotel&SPA "Dovil" 5\* (Anapa), the hotel "Imperial & Champagne SPA" 4\* (Abrau Dyurso).



**2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

**Spas:**

Russian spas are now internationally recognized and they are winners of international spa awards, e.g. World Spa Awards (<http://worldspaawards.com>): Luceo Spa at Four Seasons Hotel Lion Palace St. Petersburg - Russia's Best Hotel Spa 2015 and 2016, Mriya SPA & Wellness at Mriya Resort & Spa (Crimea) - Russia's Best Resort Spa 2016; The Professional Spa and Wellness Awards (London) (<http://professionalspawellness.com/site/WorldSpaandWellnessAwardsWinners>): The spa at Old House Resort & Spa, Rostov-on-Don, Russia - Hotel Spa of the Year 2015: Eastern Europe).

**Beauty:**

Rapid development of the Russian cosmetic industry is due to challenging economic conditions in Russia, consumers shifted towards more rational choices for beauty products which encouraged local cosmetic companies to develop and compete with the multinational giants.

**Fitness:**

Fitness has become a part of healthy life style rather than a status; it rapidly develops in the mass sector and in the regions of Russia; 10-15% of clients are people over 50; most popular are functional trainings and outdoor activities; among the latest trends are dance/yoga studios.

**Nutrition:**

Nutrition is a popular trend for healthy living from the mass population encouraged by famous tv – programmes such as Health by Elena Malysheva to scientists researching connection between nutrition and epigenomics.

**Wellness Tourism:**

More socially active people from 30 to 50 years old prefer holidays in Russian 4-5 star resorts with comfortable accommodation, medical treatments and curative facilities of the destination (Altai region in Siberia, North Caucasus, Crimea, Sochi region).

The most famous town-resort is Sochi where you can combine health treatments in numerous health resorts and tourist activities: swim in the warm sea, sunbathe under the subtropical sun, and then in an hour can ski or do trekking on the mountain slopes.

**Wellness Communities or Real Estate:**

From 10 years ago when the redevelopment of outdated health resort territories was obliged by law to include some wellness facilities in the infrastructure of real estate villages, to now when almost all elite real estate complexes are designed for healthy living and include fitness, aqua, spa and other wellness facilities, e.g. real estate complex "First Line. Life Energy Resort" near St. Petersburg (<http://komarovo1.ru>).

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Well-known “Russian banya” - traditional Russian steam bath.

Russian banya is a unique kind of steam bath in terms of combination of temperature and humidity (roughly - temperature 65 C and humidity 65%) has been known in Russia for many centuries.

The bubonic plague epidemic in Medieval Europe (the Black Death) took the lives of between a quarter to a half of the population of France, Italy and England. The epidemic that started in China and India and spread to almost all of Europe stopped exactly at the boarder of Lithuanian Russia - which is also the edge of the banya culture. In contrast to Europe where public and private baths were not available to the majority of the population, even the poorest Russian household (both in towns and villages) had their own private well with fresh water and bath-house (banya). Foreigners who lived in Medieval Russia wrote that Russians used banya 2-3 times a week and banya served for them as universal cure against all illnesses.

Banya is usually a stand-alone log building with a steam room (called ‘parilka’). In the parilka people sweat and enthusiastically beat themselves with a bundle of dried birch leaves (venik). This gentle birching (or banya’s massage) helps open the pores and rid the body of toxins. However, if there are some health problems like heart disease or hypertension, banya’s ritual is not recommended without medical supervision. Banya is adored and enjoyed by the Russian people - especially by men. If banya had been recognized as a type of spa, 90% of Russian men and up to 40% of women would be counted as regular spa goers.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

In 2015-2016, Russia continued to suffer greatly from difficult geopolitical and macroeconomic realities. The wellness economy is not growing due to the economic recession and lack of investment. Record inflation of local currency combined with substantially deteriorated economic conditions in the country significantly hindered consumers’ purchasing power which shows low priority in wellness goods and services in the majority of the Russian population.

However, some measures such as one of the strictest law in Europe regarding the sale of alcohol and cigarettes introduced during the recent years, wide popularization of healthy eating and healthy living, obligatory and voluntary medical insurance, corporate health and wellness plans are aimed at increasing of life expectancy and improving of healthcare services.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

In Russia we use both terms translated from English in a very similar way. Therefore, their interpretation is very subjective. The word “wellness” is often translated as “healthy way of living” and now we have a Russian word “велнес” for “wellness” with the same pronunciation. It is now a widely used noun, but it has not been adopted yet by the Russian linguists (it does not exist in official Russian dictionaries). To my perception we more use “wellness” for physical state but “well-being” for being healthy, wealthy and in harmony with mind, body and spirit. Anyway, for many Russians health of the body is closely connected to health of the soul which is linked to spiritual virtue of our people.

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# Industry Briefing Papers 2016

## ASIA: SAUDI ARABIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

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 is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Numerous hotel developments in the pipeline this year, which puts the spa scene on the rise in Saudi.

#### **Beauty:**

Consumers in the beauty sector are rapidly moving towards various new treatments like derma rollers, hyaluronic acid, vitamin E serum, Spirulina, etc.

#### **Fitness:**

City municipalities are building more walkways for the public and open air workout equipment.

#### **Nutrition:**

Kale, Chia seeds, Juicing and the likes of organic nutrition continues to be lifestyle necessities for more and more people. This growing demand triggered an influx of startup organic suppliers.

#### **Wellness Tourism:**

Jeddah with its exquisite coral reef is considered one of the world's top diving destinations along with several hot springs across the kingdom.

#### **Wellness Communities or Real Estate:**

This year, and through various events we're witnessing a rapidly growing community of the Arab Yoga Foundation!

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Saudi Arabia’s contribution comes in the spiritual dimension of wellness. The kingdom annually hosts close to 10 million visitors from all over the world who come to perform the religious rituals of Hajj and Umra.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Strict government regulations remain a challenge for the wellness industry here. Although, we stay hopeful with the new direction of the 2030 vision that was announced this year.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

The common understanding of wellbeing is in the physical health, while wellness is more holistic in the mind, body, and soul.

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# Industry Briefing Papers 2016

## ASIA: THAILAND

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

- Organized running events continue to sell out within hours of being advertised and Sunday's in Bangkok and other provinces will see multiple races occurring throughout that are attended by the super-fit to the casual entrant.
- Demand from China and east-Asian consumer demand continues to be strong, and this is shaping the street spa market in Bangkok. Consumers are shying away from expensive 5-star hotel spas to reasonably prices day spas that still deliver experiences, which exceed their expectations.
- Bangkok continues to see more demand for European-style barbering, grooming, and waxing services. These outlets are often to be found in the high-end shopping malls with prices to match.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

The need to adapt their business model because competition is high and established incoming market is changing with a much greater number of north and east-asian consumers expecting reasonably prices spa services.

#### **Beauty:**

Thailand's beauty market continues to remain strong, new products and beauty experiences continue to trickle into the marketplace but these largely cater towards luxury consumers seeking results.

#### **Fitness:**

New fitness concepts that incorporate elements of Crossfit and HIIT continue to open along the BTS line in Bangkok. Traditional clubs such as Virgin Active are opening new and state-of-the-art facilities but are being given a run for their money by smaller specialized fitness studios offering the "latest thing."



**Nutrition:**

Home-delivered meal plans and specialized juice plans that cater towards different types of diets continue to grow in popularity and seem to be resilient in terms of pricing.

**Wellness Tourism:**

Thailand continues to boast two of the world's leading wellness destinations (Kamalaya and Chiva-Som), both of whom underwent significant expansions in the last 18 months to cater for ever increasing demand. Thailand remains a strong and attractive destination for those wishing to experience a wellness holiday.

**Wellness Communities or Real Estate:**

A growing interest amongst Thailand's leading development companies in developing wellness communities along Thailand's eastern seaboard and also rethinking traditional older resorts in established destinations such as Hua Hin.

**3. Our theme this year is "Back to the Future." What do you feel is your country's most significant contribution to what is now a global wellness economy?**

There is nothing more associated with the image of Asian Spa than Thai Massage. Its influence can now be found all over the world, often as a staple on spa menus in prominent facilities.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The lack of English speaking Thai-nationals for employment is my primary area of concern. When comparing Thailand to other countries in the region, the labor pool's English capabilities is poor and this will continue to negatively effect more specialized tourism to the country.

**5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of "wellness" and "well-being" in your country.**

The idea of well-being in Thailand may be defined by physical and spiritual and in an environment such as this it is often the level of spiritual well being that defines a persons health and happiness. The country continues to face an emerging obsession with junk and convenience food, which previous generations were not subjected to, leading to a rise in preventable illnesses that are effecting the well being of many young to middle aged people. Wellness continues to be something aspiration that attracts overseas visitors to Thailand who seek the combination of traditional treatments, warm climate and the spiritual roots of the country.

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# Industry Briefing Papers 2016

## ASIA: THAILAND

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Thailand continues to uphold its reputation as a top spa destination in South East Asia. With a substantial number of day spas, hotels spas, wellness centers and health resorts, Thailand accommodates travelers with all sorts of budgets. Year after year, more spa and wellness offerings are becoming available, standards are rising and the Thailand Authority of Tourism is implementing new campaigns to drive spa and wellness tourism.

New spa certification regulations implemented by the Ministry of Public Health are aimed at improving professionalism with regards to treatment delivery. Though it means many businesses will have to fork out expenses to cover certification requirements for current employees or risk losing their staff, it will raise overall spa standards, hygiene and consumer safety.

Thailand Authority of Tourism (TAT) is consistently working on ways to increase spa, wellness and medical tourism to Thailand. One of their latest campaigns is "You Care You Share". Participants who share a TAT spa awareness video clip to their social media accounts stand a chance to win prizes from a collection of over 500,000 Baht.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

In September 2016 a law has been implemented that all spa therapists working in professional establishments in Thailand need to have legitimate certifications that come from government approved training centers and schools.

#### Beauty:

The Thai FDA continually enforces stricter regulation on what types of medical beauty equipment are allowed to be registered, encouraging the improvement of safety and professionalism with regards to delivery of treatment.

**Fitness:**

The fitness trend in Thailand has boomed with a multitude of different studio offerings, multi-studio membership programs, charity runs, internationally recognized marathons and triathlons and greater general interest from the local community in developing their physical fitness.

**Nutrition:**

Healthy food is now more accessible to the general populous through farmers markets, specialty shops, personalized food delivery, juice cleanse programs and the proliferation of health food products in supermarkets.

**Wellness Tourism:**

Wellness holidays including yoga, detox, spa and fitness are available all over Thailand at a variety of budgets and are expected as a regular feature on spa menu's rather than a unique offering.

**Wellness Communities or Real Estate:**

The latest development for wellness communities is the growth in e-commerce platforms that sell wellness retreats, providing a professional platform on which Thai wellness retreats can promote themselves.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Thailand – Traditional Thai Massage / Thai Spa Concept

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

International tourists, expats and affluent Thai's are the primary consumers of spa and wellness in Thailand. That leaves a vast majority of the local population not consuming spa and wellness services. In order to grow the wellness economy, there is an opportunity to tap into the budding middle class of consumers who can afford spa and wellness services, but are currently not aware of the benefits of healthy lifestyle and preventative practices. The challenge is to educate the local community to pay greater attention to their health in terms of diet, fitness, and overall lifestyle. The local population is a much more stable source of demand, as compared to tourism which is seasonal. With the correct marketing strategies there can be a higher marginal return on ad spending and loyalty programs directed at the local middle class. Additionally it will improve the longevity of the wellness and preventative industries.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

There is no significant difference between the concepts of wellness and well-being in that they both link to a healthy lifestyle. However, the terms are used differently for marketing purposes. Wellness is most often used to define an establishment or an experience that invites people to focus on improving their health. For example, a wellness center, a wellness resort, a wellness package, a wellness holiday. The term wellbeing is more often linked to the state of health of an individual. Someone may choose to improve their overall wellbeing by joining a gym, engaging in a meditation practice, changing their diet or going to a wellness resort that focuses on providing rejuvenating experiences through spa treatments, fitness and healthy cuisine.

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# Industry Briefing Papers 2016

## AUSTRALIA: AUSTRALIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

There is a people-driven move away from conventional medicine to the concept of wellness and a more natural approach to wellbeing. This is driving interest in the Spa and Retreat industries in Australia.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

An interest in short stay spa centres, where guests can sample a package of wellness therapies, along with opportunity for wellness education.

#### **Beauty:**

A legislative push toward accreditation and qualifications for Beauty therapists.

#### **Fitness:**

Government sponsored media promotion of the need for Australians to move more has seen an increase in the Personal Training industry.

#### **Nutrition:**

Private Health fund rebates for participation in both Nutritional and Fitness programs.

#### **Wellness Tourism:**

Australia attracts visitors from New Zealand and Asia with international flights becoming more cost affordable and frequent.

#### **Wellness Communities or Real Estate:**

A move to quiet and natural spaces encompassing the outdoors as much as possible.



**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

There has been a grassroots push away from pharmaceutical solutions back to more natural and complementary therapies to support health and wellness. Social media networking has been integral in this paradigm shift.

Internet based programs have enabled the dissemination of evidenced based research to support therapies such as herbal medicine, spa treatments, acupuncture and relaxation modalities in healing.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Antagonism from conventional medicine is a major challenge. Government regulations can make competition with other countries tricky, but also provides client confidence that high standards are being achieved.

**5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness is achievable through adherence to favourable lifestyle choices that include

- 1) Good nourishment,
- 2) Balanced movement,
- 3) Stress management, and
- 4) Minimising the body’s toxic burden.

Wellbeing is a sense of positive energy and attitude that can flow from the application of these four wellness principles..

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# Industry Briefing Papers 2016

## AUSTRALIA: AUSTRALIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Wellness travel is gaining momentum - at last. In Australia mainstream publications are now seeking out wellness travel options and information and are also using relevant research and stats as well as creating dedicated coverage. This has created solid exposure this year and shows signs of increasing further.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

The idea that a massage is a special occasion and not part of an overall wellness plan is changing. More spa and wellness coverage than ever before represents an exciting time for our industry.

#### **Beauty:**

Training schools embarking on more holistic wellness approach to treatments, at Gwinganna we have moved from the term Beauty Therapist to Holistic Skin Care Therapist.

#### **Fitness:**

Physically; The emergence of the virtual worlds and a return to hands on help, the 24 hour club peak is declining. Mentally; the ability to navigate the internal emotional landscape for greater stress management, preventing heart disease and general happiness.

#### **Nutrition:**

Quality, correct quantity and balance of nutrients in food, how it is sourced and the environmental impact is driving more to purchase organically grown.

**Wellness Tourism:**

An increase in the awareness of emotional resilience from both the guests desire to explore their inner landscape and the destination providing qualified counselling and spiritual experiences.

**Wellness Communities or Real Estate:**

Small movement, yet strong and authentic approach to true sustainability and community. Also, adjustments to traditional aged care facilities, an emerging strong trend for improvements of quality of life within the environment.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Destination Spa’s/Health retreats offering a guest experience that is governed by strong boundaries based on wellness outcomes. Australian health retreats are brave and say ‘no’ to guests to maximise physiological and psychological changes during their stay. Rather than 5 star service there is a focus on 5 star support towards lifestyle change.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

No comment.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness is something that you work towards consistently to achieve ‘being well’ or ‘well-being’.

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# Industry Briefing Papers 2016

## AUSTRALIA: AUSTRALIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

From the Hotsprings industry in Australia what is making news are the following,

- a. Integrating treatments and products that gel nicely with bathing
- b. Introducing global cultural influences on spa and bathing
- c. Research completed by RMIT highlighting the many positive benefits from bathing
- d. Building packages on programs which include nutrition, exercise, positive psychology, spa treatments and complimentary medicine in conjunction with bathing

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

The competition in architecture, aesthetics and interior design is producing some amazing spaces.

#### **Beauty:**

Moving away from the traditional spa to a spa where the focus is on technology and the use of machines, as you would have seen just in the traditional Medi Spa.

#### **Fitness:**

General fitness has moved to being competitive an example of that is the huge explosion of interest in cross fit games in Australia.

#### **Nutrition:**

Forget calories it's all about the quality of the food.

**Wellness Tourism:**

People have become more focus on visiting destinations with clean air, water and food.

**Wellness Communities or Real Estate:**

The ultimate aim is to be off the grid.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Outdoor active pursuits such as beach culture.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Labor costs and government red tape.

**5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of “wellness” and “well-being” in your country.**

Wellbeing is a ‘quality of life’.

Wellness is a conscious self-directed and evolving process to achieve a quality of life.

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# Industry Briefing Papers 2016

## EUROPE: AUSTRIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Perhaps one of the most striking things about the wellness industry in Austria is its sheer size relative to the size of the country. With a population of only 8 million, Austria has a wellness industry that can boast of \$15.7 billion in annual expenditures, which account for 3.7% of GDP. To put that in perspective, of the top 10 wellness markets worldwide (Austria ranks 5th), the next largest contribution to GDP can be found in Italy at 1.3% --less than half of the Austrian figure.

Wellness takes a prominent place in Austrian economic planning and the industry receives generous government support to further its development. It is seen as a patriotic act when Austrian politicians announce that they are taking a wellness vacation. And one thing they can expect when they do so is wellness at a very high standard—because Austria has some of the best wellness hotels in the world. And because there are some 1,100 wellness hotels, Austrians don't have to look too hard to find one.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Austria excels in the category of thermal spas, both in terms of numbers and quality, and a particularly positive trend has been the improvement in quality during the past few years, a trend that has been driven by increased competition.

#### **Beauty:**

With one of the largest organic food sectors in the world, it is not surprising that in Austria there is a huge trend toward organic cosmetics of regional origin, because customers want what goes onto their bodies be no less healthy than what they put in them.



**Fitness:**

Austrians prefer to combine fitness with fun, which means physical activity in a natural environment, whether it be Nordic walking, skiing or hiking, and that means that almost all wellness hotels include such options in their offers.

**Nutrition:**

Austrians are unusually attuned to issues related to food and the environment. Regional is the new organic, and there is an increasing desire to source food locally, not only in the interest of sustainability, but also in a quest for higher quality.

**Wellness Tourism:**

Health tourism has a three-hundred-year history in Austria, and recently the country has built on this historical foundation to integrate wellness in the larger framework of health strategy. Because demographic developments are shifting health policy to central stage, the development of health and wellness tourism is also becoming a national priority.

**Wellness Communities or Real Estate:**

Wellness is not really much of a theme in real estate development in Austria, but what is increasingly a hot topic is making already existing communities healthier places to live. Money is increasingly being invested at the community level to improve quality of life for residents by making the living environment more health promoting.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The Austrian (and German) health tourism industry was instrumental in the late 1980s and early 1990s in extending the definition of wellness to include its range of leisure products, which focused on pampering and rejuvenation. Health promotion played a much less prominent role in the Austrian wellness definition back then, but recently one of the big trends in the Austrian wellness industry has been a reconnection with themes that were part of the original American definition of wellness: a holistic view of health, physical activity as a key to well-being, stress management and a healthy diet. Wellness hotels now regularly make a point of including such themes in their offers, and burnout prevention packages are frequently being marketed by hotels in search of new market niches. Not all such offers include professional help, however, which raise questions about how sustainable the improvement they promise will be for the guest. Here is an area that needs attending to in the future. Fortunately, the awareness of this need is going.

#### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The increasing competition in the wellness industry makes it challenging for businesses to survive. Among wellness hotels, in the 4-star category the competition is particularly intense. Customer expectations regarding quality and breadth of services have grown, which has led hotels to invest in increasingly opulent wellness “oases”, many of which will hardly pay for themselves. In the near future this may well lead to a consolidation within the industry. A key to survival will be the quality of personnel, and here the fact that Austria is a global leader in tourism education certainly provides a competitive advantage.

#### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Because of the historical development of the term wellness in Austria, it continues to be associated especially with what thermal spas have on offer—with thermal water, massages, various health and beauty treatments.

Well-being, on the other hand, has a wider, more holistic meaning and is associated with work-life balance (facilitated by the large number of holidays and vacation days in Austria), good, healthy food, physical health generally, as well as the conditions that permit one to maintain it, a secure environment—both in terms of a low crime rate and low rates of pollution, a broad social net—in short a high quality of life.

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# Industry Briefing Papers 2016

## EUROPE: AUSTRIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

I believe it is currently still the “let us have a break” idea, which is dominated in the news in regards of spas and wellness resorts.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Quality rises and rises and with this, customers get better and better choices and become more educated, what a real good facility looks like and shall offer.

#### **Beauty:**

Everybody wants to live long, but nobody wants to get older. We all know, you can't have the cake and eat it. But at least, we want to create the imagination of looking young forever.

#### **Fitness:**

Young and old generation interacts more and more with the technical gadgets and supports for that

#### **Nutrition:**

Junk Food is out and the new generation wants to know exactly what they eat, where it comes from and how it was produced.

#### **Wellness Tourism:**

Relaxation – be it for a day, but then really to take advantage out of a full day, or be it for an add on to an “in the know “ vacation are the new two additional areas, besides of the normal learned reason to go for a couple of days for a wellness stay in a resort. Since wellness has become an integrated part of your daily life, being on vacation, it has to travel with me.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The highest density on highly developed hot spring spas, almost 40, compared to the inhabitants, you will find in Austria. Combined with the significant mountains and glaciers in Austria, Alpine-Mountain Spa and Thermal Springs Spas are for sure, where Austria stands for.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Urbanization and transportation are the critical questions to answer in the future - not only in Austria, but overall. The young generation tends more and more not only not to own a car anymore, as well not even having a driving license anymore. And, the growing part of elderly guests, who is kind of scared to travel long hours in their cars. For both to create offers where the logistic from home to countryside spa resorts are being taken care will be the future success.

**5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of “wellness” and “well-being” in your country.**

In my opinion, taking wellness from the word wellbeing and fitness, we are seeing now that wellbeing is the new -old- approach, to see a healthy living in a holistic approach, where not only fitness, but as well the right food, the proper beverages, the air, the community you are embedded and the stimulating surrounding of your daily living is what creates balanced mind and with this therefor even more than wellbeing, I would rather call it well-feeling(s). And therefor, well-feeling(s) is for me personally the “back in the future” approach, of where our industry Schall develops.

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# Industry Briefing Papers 2016

## EUROPE: AUSTRIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Focusing on the most important treatments & execute them perfectly. Integrate your surrounding in the SPA-Program. No gimmicks – be honest and as near to nature as you can.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Too much properties with low quality .

#### **Beauty:**

High quality & natural products – personalized services.

#### **Fitness:**

Tailored personal training will be a major TREND.

#### **Nutrition:**

Quality in food and beverages is the most important issue as well as a balanced nutrition plan. No more diets!

#### **Wellness Tourism:**

Nature and off-site places are more and more important.

#### **Wellness Communities or Real Estate:**

Silence and spin-off properties are the winners in the to what is upcoming times

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Countryside, Nature, Silence, SPIN OFF and Tirolean happiness. No fancy entertainment – but true hospitality.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Getting the right staff with the right attitude ! Finally it’s all about the people living the philosophy.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

“Well being” is about the entire concept you create to feel well – “Wellness” is the classical wording for SPA & Beauty treatments.

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# Industry Briefing Papers 2016

## EUROPE: AUSTRIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

I think individuality will become more and more important in the spa and wellness sector. People want to have things like treatments which are custom-built.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Special treatments including sustainable and organic products with Austrian origin are nearly a must.

#### **Beauty:**

Special treatments including sustainable and organic products with Austrian origin are nearly a must.

#### **Fitness:**

Group sport activities become more attractive than being alone in the fitness center.

#### **Nutrition:**

I think detox is still an important factor to choose a certain wellness hotel.

#### **Wellness Tourism:**

Because of lack of time and maybe also because of troubles which are going on around the world, a lot of Austrian people stay in their home country.

#### **Wellness Communities or Real Estate:**

Best wellness hotels Austria.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

We have cooperations like “Best wellness hotels Austria” which make it possible to market the wellness offers in Austria more easily. Because of our nature, the Alps and lakes, the wellness sector will grow and grow because nature becomes a more and more important part of wellness.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

I think the biggest problem will be finding personnel. The tourism/wellness sector is still hard to work in. Working hours and the payment needs to be overthought.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

For me wellness sounds more active like doing sports, hiking, swimming etc. and well-being is something which I do directly and only for me and my body like beauty treatments, eating and so on.

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# Industry Briefing Papers 2016

## EUROPE: AUSTRIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Austria, as the pioneer of wellness-development, is facing a period of a strong transition. There is a high level of competitiveness especially among SPA hotels where large wellness facilities are included in the room price and guests have come to expect high standards. SPA treatment areas are noticing decreasing demand for classical beauty or massage treatments and therefore spa and hotel operators are being challenged to come up with new offerings. In response to this transition, we have developed totally new health-experiences which fascinate guests, lead to additional income and will revolutionize the market.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Shift away from mass towards uniqueness.

#### **Beauty:**

Significant trend towards medical cosmetics in beauty treatments.

#### **Fitness:**

Increased orthopedic expertise being brought into fitness institutions.

#### **Nutrition:**

Trend goes towards individualized nutrition programmes that are based on food intolerance tests.

#### **Wellness Tourism:**

Orientation towards holistic offerings with significant push in the direction of prevention.

## Wellness Communities or Real Estate:

Repositioning of spa and wellness facilities to increase the uniqueness and increase profitability per square meter

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

In Austria the focus definitely lies on the combination of the wonderful nature and the holistic Wellness and SPA offerings, with a high tendency towards high-end preventive offerings including medical Spas. As a mature market, Austria is once again trying to lead the way towards the introduction of these new innovative and high demand areas.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The greatest challenge is now mastering this next transition to new innovative offerings where preventive holistic medical spa elements are integrated into existing environments.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

The term wellness can be described as the variety of wellness equipment offerings, while well-being can be seen as the holistic physical and mental comfort.

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# Industry Briefing Papers 2016

## EUROPE: AUSTRIA

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

People are increasingly aware of the fact, that they only have a limited amount of time, they cannot buy themselves more time and they want to make the best of it. 75% of wellness guests mention “a quality time out” as their main reason for a wellness vacation.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

Spas taking time and sharing time (and knowledge) with your guests (individual and highly professional personalized service), deeper insight into health issues, treatments with added value.

#### Beauty:

Beauty natural organic skin care is growing tremendously.

#### Fitness:

Fitness functional training with nothing but your own body weight, (exercises coming from Pilates, Qigong or Yoga).

#### Nutrition:

Clean pure slow regional food without artificial additives, rediscovering the values of traditional food rather than exotic “super foods”.

#### Wellness Tourism:

Wellness Tourism regional sustainable eco resorts (guests don’t want to waste too much time for traveling to distant locations for their “in between” time out holidays).

#### Wellness Communities or Real Estate:

Wellness Communities or Real Estate not yet a hot topic in Germany.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

“Taking the waters” in one of the many thermal springs in Germany (also in Austria), the typical Kur, when people visited the Kur villages for weeks in a row, to get cured from whatever illness they had. The Kurmedizin (healing with natural sources, like water, earths, salts, radiation, air, sea, herbs and more sophisticated systems like the Kneipp system).

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Governmental restrictions.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellbeing is the highly individual state of feeling well, which is different for every person.

Wellness is describing the different methods of how to achieve wellbeing, including lifestyle, (health, fitness, beauty), nutrition, psychological factors etc. Two extremes, as seen in the two trends of self-optimization on the one side and digital detox on the other side show the dilemma our guests find themselves in: they realize, that they are responsible for their own health, and they go to extremes to reach this goal.

The biggest extremes regarding nutrition are probably vegan and the meat based paleo diet. For each choice there are hundreds of experts, and nobody listens to the old wisdom anymore, that only a “balanced lifestyle is a healthy lifestyle”. As a medical doctor with a training in Traditional Chinese Medicine, I believe that the most important factors to achieve wellbeing is: a balanced lifestyle, nutrition that tastes good and makes you feel good, daily gentle movements to stay flexible and strong, deep undisturbed sleep, fresh air, the absence of noise, chemicals, light during the night and other artificial man made conditions in our environment, and most important, the intelligent use of our lifetime.

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# Industry Briefing Papers 2016

## EUROPE: AUSTRIA

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Wellness in Austria has become an important topic in the collective society and this means the topic wellness can be handled on different levels.

Also the subject social wellness (wellness holidays with female friends, men's-retreat) will be even more present.

The uptrend is apparent and we can see that comprehensive health care concepts do increase. (Body – Soul – Spirit ). In this aspect topics about "mindfulness" and "healthy sleeping" have to be emphasized.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

We need to provide reasonable and sustainable offers and concepts which should always be light and easy and full of pleasure.

#### Beauty:

Our aim is a meaningful combination between apparative cosmetology and "hands on" effects but also we need to make sure that there is no shortage on pleasure.

#### Fitness:

The use of fitness-wearables and fitness-apps will be essential in the nearer future and will be developed further on.

#### Nutrition:

More important than ever will be the use of regional, seasonal and healthy food products in the hotel-kitchens. Food supplements with natural ingredients will be even more present.

### **Wellness Tourism:**

The consumers in Austria are spoilt when it comes to wellness – meaning the level is a very important factor and must be preserved no matter what. In addition, we need to react to the overnight stays which are becoming shorter and shorter.

### **Wellness Communities or Real Estate:**

It's about time to give higher priority to sustainability when building a new wellness facility or wellness hotel. In order to be up to date we should think about offering full serviced apartments combined with wellness-zones (pool, massage-, fitness-area)

### **3. Our theme this year is “Back to the Future.” What do you feel is your country's most significant contribution to what is now a global wellness economy?**

In Austria the wellness tourism is to be found in the 4\* and 5\* hotel industry.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

It is essential to understand the different needs and requirements of our consumers. Due to the fact that nowadays wellness retreats are interesting for different target groups the offers have to be more focused and refined wellness holidays.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

In my opinion these differences are hardly or almost non existent. Wellbeing is rather perceived as a part of wellness.

In Austria wellness is primarily seen as health prevention mainly through passive treatments as well as pampering treatments and stays in Wellness-Hotels, Thermal baths and Day-Spa's.

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# Industry Briefing Papers 2016

## EUROPE: AUSTRIA

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Many spa hotels offer a big portfolio but it is difficult to offer high quality when you have a broad selection of treatments. By focusing on more specific treatments it allows ordinary wellness to move into profound wellbeing.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

To become a specialist in one specific area.

#### Beauty:

Major developments in Austria are the anti-aging trend and naturopathic, high-tech cosmetics.

#### Fitness:

Developing lots of outside programmes that take place within nature or the surroundings that you are actually based.

#### Nutrition:

Healthy cooking – using regional, seasonal produce. As well as the ever popular move to a vegetarian or vegan diet.

#### Wellness Tourism:

To improve or maintain health and quality of life while focusing on prevention. There is also a focus on diagnosing and creating programmes or treatments for existing conditions.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Austria is in the heart of Europe and is a renowned destination for medical tourism. Doctors from Austria have an international reputation. The country represents our good nature and the quality of services.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

To offer quality over quantity and to make sure you work on your specific strategy and not just go with the latest trends. It is important to hire highly experienced staff and further train and develop their skills according to your method or philosophy.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness refers to the physical health and can also be pampering whereas wellbeing refers to the quality of life and long lasting results.

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# Industry Briefing Papers 2016

## EUROPE: CROATIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Innovations are related to the use of natural resources such as thermal water and the emphasis on cosmetics from indigenous resources. The packages and programs promote wellness story and story of nature, cultural and historical surrounding which are engaged in the seasonal offers. For example, cosmetics and treatments in the autumn period of the year are based on sea salt, lavender, thyme and other seasonal herbs and resources.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

Spas:

Beauty:

Fitness:

Nutrition:

Wellness Tourism:

Wellness Communities or Real Estate:

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The most significant contribution of Croatian wellness to what is now a global wellness economy is a wealth of natural healing factors, thermal water, naphthalene, thalassotherapy, halotherapy, natural environment conducive to the treatment of respiratory issues.

#### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The biggest challenge in Croatia is to make a year-round wellness product because of strong “sun and sea” destination image worldwide. Croatia has more than 90 hotels with wellness centers (medical wellness, spas and spa resorts), with extremely low direct share in the total revenue of the hotels (3-4%). On the other hand, these hotels achieve almost 50% higher average revenue per room compared to average revenue per room. The 90% of the hotel spa areas are leased to wellness companies. In this case, if the hotel is open seasonally, it is not possible to offer whole year wellness product. If the hotel's offer is not based on wellness as one of the main products, and wellness is considered only as a lease revenue, it is difficult to create the wellness image. Through organization of various workshops, design packages and better cooperation of hotels and wellness companies, with existing wellness offer, Croatia has the possibility to become a desirable central European and Mediterranean wellness destination. Certification is one of the first next steps to be taken in creating a market image.

#### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

We could define wellness as content and well-being as a feeling that the guest gets using many different wellness facilities. Well-being is becoming an integral part of all tourist trips, and in the broadest sense, the tourism in general can be considered a health tourism.

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# Industry Briefing Papers 2016

## EUROPE: FINLAND

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

The truth is, that Finns have one private sauna per two citizens; that many Finns use sauna daily; that they all have a summer cottage on the lakeside; that they pick berries and mushrooms from the forest at summertime; that they all ski at wintertime; they grow up eating healthy food at school, partly supported by the government; and when they get older, they get at least one week spa vacation every year, paid by the government. No doubts, that it is "well" to live in Finland. What can Finland provide for wellness tourists, is another topic. Winter sports and ski resorts are in good shape, but as said, country's natural resources could provide more. Finland is aware of its values as a wellness destination, but urgently needs to find a modern way to promote and track all the activities.

Anyway, one trend shows a tendency of increase: it is forest bathing. During the last summer Koli area has recognized increasing amount of tourists from Asian countries, who come to stay there. They do nothing. There is nothing to do. But there is a nature. Silence. Space. Just to be. And enjoy.

Another similar service that could be enlisted as a wellness travel is "guest farming" - local farmers invite guests to come to stay at their homes and help the family in daily agriculture routine, as a vacation and enjoyment.

The current initiative at KasvuOpen, a program for startups to support creation of digital solutions for health and wellness sector in Finland. With these solutions local businesses will be able to use the benefits of digitalization to promote themselves globally.

One of such digital products is Wellmonde - integral platform for the whole wellness community, available globally. It provides personal profile, where user can store and collect information on his treatments worldwide, helps specialists to track the details of the procedures, and creates the marketplace for wellness brands. With digitalization and gamification, Wellmonde collects valuable data and statistics that might present some great insights for the industry.

## **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

The influence of digitalization remains strong throughout all the wellness sectors. Being a digital product, Wellmonde tries to stay inclusive and manages to fulfill the needs of each domain:

### **Spas:**

Through personal profile Wellmonde connects spas, spa customers, specialists and spa brands between themselves.

### **Beauty:**

Wellmonde connects beauty brands with their customers and customers can find their favorite brands while traveling as well they can follow their treatment programs easily.

### **Fitness:**

Also fitness brands are connected with their global customer base, with Wellmonde, helping users to find the same courses, they are attending at home, during their travel. Adding new activities, such as nordic walking, forest bathing, sauna, or lake swimming can also counted to their personal wellness activity list.

### **Nutrition:**

Following the eco-trends, Wellmonde provides help in finding healthy food globally, follow spa cuisine globally and especially find organic, local food at your destination.

### **Wellness Tourism:**

Available globally, Wellmonde is a major benefit to the wellness tourism sector. While people travel, they can follow their choices for their wellbeing and industry gets a valuable data, in real time.

### **Wellness Communities or Real Estate:**

Wellmonde creates a global wellness community and meeting point of customers, businesses and brands in digital cloud, which is a modern solution to networking.

## **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Without any doubt, Finland has a well-known heritage of Sauna traditions, but also, in a future perspective, it has a natural source for forest bathing, natural sources for healthy food and wellness tourism. Arctic Wellness idea is based on nature, wilderness and silence together with unique tranquility, hospitality and true friendship. There are 190.000 lakes size more than 1 acre in Finland and 1,3 million saunas per household plus additional 1 million saunas at summer cottages. The forests take 71,6 % of the Finland area making 4 hectares for every Finnish person while European average is 1,3 hectares per citizen. Finnish unique everyman`s right

allows to pick berries or mushrooms or just walk in any forest, private or state owned. In Finland the idea of getting back to the future means getting back to the roots. Snow, lakes, arctic food, aurora borealis, silence and peace have been and will be.

#### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

State has created a strong network of social wellness services for elderly people and for rehabilitation to anyone. That bears the best idea to help people live longer and healthier but it is a challenge for the private companies to compete with the state on opening new spas and wider the range of wellness services.

Another challenge is reliable statistics and data, which is provided only by state funded KELA, but does not represent the whole Finnish wellness industry. Private enterprises, 3rd sector and individual operators are not connected and no wellness cluster exist, either regional nor state level. We do not know the value added of the Finnish wellbeing and wellness industry.

The biggest challenge for wellness is to remain in close and personal connection with customer, while being global as a business or a destination. Nonetheless, with help of digital technologies these challenges can be successfully met and managed.

#### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Even though the idea of wellness is familiar to everyone in Finland, the exact word “wellness” is quite a stranger. Somehow, it is more common to use a word “wellbeing”. In Finland selfness and LOHAS are the key factors already now in leisure and working life. As described above, a general lifestyle in Finland is healthy and generally, wellbeing is granted naturally (by nature and by legislation) for people who live in Finland. Based on that wider understanding of wellbeing, most research papers, where Finnish wellness has been analyzed, have used a term wellbeing, as more precise to describe a situation today, and probably in a future perspective, as well.

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# Industry Briefing Papers 2016

## EUROPE: FRANCE

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

#### INVEST IN HIS HEALTH CAPITAL

Because anticipation means ensuring a durable health capital and because prevention equates to gently encouraging healthy behaviour, global health is an approach based on awareness of the impact that lifestyle and environment have on the body. With this in mind, Alliance Pornic has forged a concept based on the fundamental principles of thalassotherapy and a combination of new technologies with age-old therapies that provides a global approach to good health. Last year saw the creation of the Health Capital Space, equipped with tools offering additional tests, diagnosis and treatment devices, available à la carte or as part of treatment packages: Cryotherapy, PhysioScan, Infrared sauna and, since the beginning of 2016, the OligoScan.

Alliance Pornic's new treatment programme, Premium Health Capital, is a global experience for both body and mind based on 4 fundamentals: taking stock of your own health resources, nutrition, physical activity and the biology of sleep.

#### HIGH-TECH & WELLBEING

##### Thalasso in cryotherapy mode

Whole Body Cryotherapy (WBC) was developed in the 1970s in Japan for therapeutic purposes prior to becoming widely used by top sportsmen and women to boost performance preparation and recovery after an effort or injury. Alliance Pornic was the first centre to be equipped and by doing so created a Health Capital Space (See ESM 42), then Thermes Marins de Monte-Carlo also acquired this technology. In 2016, the thalassotherapy centres in Cabourg and Arcachon in the Thalazur Group, the thalassotherapy centre Dinard Thalassa Sea & Spa, the Sofitel Biarritz Thalasso Sea & Spa and the Sofitel Quiberon Thalasso Sea & Spa (Accor Group) will be enhancing their offering with Whole Body Cryotherapy. But other thalassotherapy centres and thermal spas are, at the time of writing, poised to sign up.

### **Stress management with cardiac coherence**

**The principle:** Based on neuroscience, cardiac coherence is a stress prevention and management technique that also has a balancing effect on our emotions. It involves learning to become aware of a “resonance-balance” between the heart and breath.

**Where:** The Vichy Célestins Spa Hotel has equipped itself with the interactive cardiac coherence technology Symbiofi, validated by the Lille University Hospital. This new technique has been integrated in the treatment programmes Body-Mind Serenity, Anti-Stress and Burnout and Digital Detox.

**The session:** Comfortably seated in front of the device’s screen, miniaturized analysis sensors record the cardiac system. This method restores physiological homeostasis by synchronizing the heart rate with respiration. This reverses the effects of stress that, when it becomes chronic, creates physiological disorders, burnout and leads to illness.

### **In the arms of Morpheus with dodow**

**The principle:** Elegantly designed like a large white pebble and equipped with three blue LED lights, Dodow helps synchronize your breathing with the rhythm of the lights.

**Where:** The Dodow is available in all thalassotherapy centres belonging to the Thalassa Sea & Spa group. It is particularly used in the Sleep and Anti-Stress treatment programmes at the Dinard Thalassa Sea & Spa.

**The session:** With the Dodow, your breathing pattern becomes progressively more regular, with each exhalation longer than the inspiration, resulting in a feeling of fatigue. Respiration is the only part of the autonomous nervous system that we can control consciously. A regular rhythm of 6 breaths per minute maintained over a sufficient amount of time activates the baroreflex, a physiological mechanism that rebalances the autonomous nervous system, where the underlying cause of insomnia is to be found.

### **Vibrational therapy with the ondo relax**

**The principle:** A water mattress that delivers a therapeutic massage to the back of the body using vibrational therapy. The body completely lets go and the treatment is deeply relaxing.

**Where:** At the Thermes Marins de Saint-Malo

**The session:** Based on ultra-performance technology, the Ondorelax mattress is equipped with a dome that enables it to be combined with complementary therapies such as music therapy and chromotherapy.

### **Quantum therapy with the Physioscan**

**The principle:** This “global health assessment” technology is the most advanced yet. A check-up and energetic treatment based on bioresonance therapy that targets stress at its source and eliminates a great part of it through “metatherapy” and the “tuning” of cells to a frequency that is optimal for their functions.

**Where:** At Alliance Pornic where PhysioScan sessions are offered in its new centre, the Health Capital Space.

**The session:** With this device, it is possible to listen to the frequencies emitted by each cell, tissue or organ and detect dysfunctions. Non-invasive, the PhysioScan delivers a fast and highly precise energetic assessment of the different systems that are determining for an individual's balance.



### **Connected treatment programmes with the fitbit bracelet**

**The principle:** The Fitbit bracelet is a connected object, a veritable physical and chronological assistant that gathers biometric and physiological data on a daily basis.

**Where:** With the new concept Connection Thalasso at the Thalasso Serge Blanco, clients wear a Fitbit bracelet that enables their evolution to be closely followed throughout their treatment programme. This concept is included in the Slimming, Detox and Body Awareness programmes.

**The session:** Available for consultation on a computer or smartphone, after analysis, the gathered data provides all the necessary information for a tailored experience.

## **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

**Spas:** The return to simplicity and authenticity is surely the strongest trend for 2016 in France: Spa menu get shorter and turned to local specificities both in terms of skills and use of local resource.

**Beauty:** Cosmetique devices + cosmeceutiques rise

**Fitness:** Coaching + connected fitness

**Nutrition:** Local & seasonal food: regime is has been but balance

**Wellness Tourism:** Healthy cure et preventive health

**Wellness Communities or Real Estate:** Opened in December 2015, Six Senses Residences, the renowned hotel and Spa group's first residential project in Europe, is located in the heart of the world-famous ski resort, Courchevel in France.

## **3. Our theme this year is "Back to the Future." What do you feel is your country's most significant contribution to what is now a global wellness economy?**

France is the 2nd wellness destination in the world after Germany. Its popularity is explained by the country's expertise in water-based health care and the characteristic therapies developed from its 3 types of water: thalassotherapy with sea water, thermal therapy with its various hot springs and, of course, the spa industry that has been constantly developing since 2002.

Another strong point is France's high level of expertise and renown, again worldwide, in cosmetics. L'Oréal, the world's beauty industry leader, is present in 130 countries over five continents. French brands embody luxury and expertise. They are just as popular with the general public as they are with professional networks. Real success stories are taking place in the French wellness industry: Cinq Mondes, Biologique Recherche, Thémaé, Phytomer, Carita, Decléor, Thalgo, Payot, Anne Sémonin, etc.



#### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The French Government has launched the France Développement Tourisme platform in order to achieve the objective of attracting 100 million foreign tourists to France in 2020. The platform will unlock €1bn to improve hotel infrastructure, modernise tourism facilities (marinas, spas and hydrotherapy, exhibition centres, etc.) and support SMEs in the industry.

A project for a new thermal resort in Châtel-Guyon was officially launched on 18 July. The resort is made up of a new-generation thermal establishment, a 4-star tourist residence, a restaurant, and a service residence for independent senior citizens that is unique in France. It will open in 2018 in Châtel-Guyon spa park. Caisse des Dépôts will provide 42% of equity capital needed for the property operation. It will be a minority co-investor in the joint-venture firm France Thermes Immobilier SAS, which is tasked with constructing and bearing the property side of the project. The total investment will be one of the most significant made over the last few years by a private group in the French balneology sector. This investment is part of the France Développement Tourisme platform to support the development of balneology. It's the most relevant challenge for wellness tourism in France.

#### **5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of "wellness" and "well-being" in your country.**

Wellness embodies an art of living that gathers together several sectors: the word has a general and all-encompassing meaning.

Wellbeing is more focused on the individual and his/her wellness needs. The individual draws from wellness what is needed to attain wellbeing.

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# Industry Briefing Papers 2016

## EUROPE: FRANCE

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Hotel groups or other groups (Pacha, ...) are investing in Europe in hotel, resorts with spa/wellness concept or retreat. They all want to offer an innovative concept, a life style that will be the next trend: "jet set" life style, "health" orientated life style, advance esthetic surgery journey .... The combination of all... But with one goal: to find a way to live new experiences.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Seen as a global wellness retreat that combines food, quality of sleep, body and mind exercises, and beauty service where detox is the main objective.

#### **Beauty:**

Efficiency is the key word for all skincare brands regardless if they are natural or cosmeceutical.

#### **Fitness:**

Running is huge now! 8 Million runners in France which is 40% more than 10 years before. Running is trendy because it can be done anywhere with almost nothing. Almost nothing because fashion and high technology (connected objects) are more and more part of this sport.

#### **Nutrition:**

Gluten free, lactose free, detox program are still growing, but also "cosmetofood" and food supplements/ beauty drinks.

#### **Wellness Communities or Real Estate:**

Under development in France unlike in the US where healing retreats are popular since a decade

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The French art or tradition of welcoming guests, the sophistication in the cosmetic industry: The French touch!

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

To attract the worldwide clientele that use to come to France before the terrorist attacks. Long term: The cost of labor and working regulations: special agreement must be received to be able to be open on Sundays ....

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness is the consequence of the well-being habits of each of us

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# Industry Briefing Papers 2016

## EUROPE: FRANCE

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Massage, beauty, fitness and yoga on demand are getting big now. Spa and wellness related activities are available everywhere at every moment and with a wide range of prices. Urban wellness retreats are also developing.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

Pop up spas, short spa treatments, spa on the go.

#### Beauty:

Luxury skincare brands launch new concepts focusing on services delivered at their owned points of sale.

#### Fitness:

Run, run, run... running is gaining thousands of new runners among young crowd and ladies, resulting in a big market in France.

#### Nutrition:

Healthy food everywhere: healthy options are now available everywhere, including in the train ☺

#### Wellness Tourism:

Dramatic circumstances impacted overall french tourism in 2016 and most wellness tourism come from domestic market short trips

#### Wellness Communities or Real Estate:

Paris city mayor launched a tender to « reinvent Paris » with a call for zero waste, zero carbon. The winner 23 projects were announced early 2016, see [www.reinventer.paris/en/](http://www.reinventer.paris/en/).

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Definitely thalassotherapy, using sea water for healing and wellbeing purposes developed in France from the 19th century onwards.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Strong medical and pharmaceutical lobbies certainly have an impact on rules and regulations, as well as on public poor perception of alternative, and preventative health and wellness approaches.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

We translate both terms with one word in French “bien-être”. Recently we also use more often the term “mieux-être” to express a greater well-being as an objective or a motivation to engage into wellness activities.

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**CLARINS**



# Industry Briefing Papers 2016

## EUROPE: FRANCE

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

A whole literature as well as a new wellness press is now dedicated to the subject. If the public is rather enthusiastic about this new lifestyle, philosophers and sociologists have a lot of critical observations towards "the care of self " seen as an obsession of the physical appearance and the personal fulfillment. Thus, the quest of the well-being may appear as a form of egocentric happiness and the cult of wellness be considered as a new religion. Practices such as meditation could even be quoted as dictatorship of the well-being.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

At a time where everything collapses: institutions such as family, school, church, the spas which carry new values and hope of a better life, tend to be regarded more like an art of living than a cocooning experience, and why not as new cathedrals?

#### **Beauty:**

More than trends, there is a global new attitude towards beauty such as more natural (to give up make up to have a better skin or use home-made cosmetic), organic and slow cosmetic, happy aging rather than plastic surgery.

#### **Fitness:**

To become an actor of one' own health &well-being with Nordic walking, hiking, yoga, tai chi, chi kong, and practice of mind-body exercises for a lasting well-being.

#### **Nutrition:**

The success of cooking classes and fasting sessions are the proofs of a new awareness for better nutrition with natural, organic, vegan products and living food.



### Wellness Tourism:

Short escapes, spas breaks, tree houses in the woods, glamping, are new mottos for individual tourism but wellness/well-being in companies is also a new topic with happiness courses, motivation trips and incentive programs in breathtaking natural setting.

### Wellness Communities or Real Estate:

Heritage of The Age of the Enlightenment, the new paradigm “reload to nature” is a passport for health and happiness ; from care to cure, aspiration for holistic wellbeing, in healthcare temples, sanctuaries and retreats, leisure parks or monasteries.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Thalassotherapy, back to the 16th century, The French doctor Ambroise Paré (1510-1590), one of the “fathers of modern surgery” convinced of the benefits of seawater, prescribed sea baths to his patients.

1865 is considered as the year of the beginning of “Thalassotherapy” as Docteur La Bonnardière (1829-1887) invented the term from the Greek words “thalassa” (sea) and “therapeia” (treatment). Doctor Louis-Eugène BAGOT (1862-1941) build in 1899 l’ “Institut marin de Rockroum” first “marine institute”. The thalassotherapy centre established in Roscoff became the first “sea spa” in Europe. Dr Bagot is also the inventor of kine-balneotherapy (movement in warm seawater) (1903). His son Dr René Bagot took over in the 50s and combined marine hydrotherapy with reflexology massage to create the palpating-rolling technique. The first Maritime hospital was created in Berck-sur-Mer (1869) by Drs Lhoste and Perrochaud .The biologist René Quinton (1866-1925) published a scientific work on the therapeutic benefits of seawater: “Seawater; organic medium”. In 1964 Louison Bobet (1925-1983) a famous French professional cyclist established in Quiberon launched a new health&leisure concept by the sea, the first modern thalassotherapy institute was born.

Aromatherapy , back to the publication of the book “Les Grandes Possibilités par les Matières Odoriférantes”, in 1835 by Dr Chabenes who became the teacher of R.M. Gattefossé,

René-Maurice Gattefossé (1881-1950), the chemist is the inventor of the word Aromatherapy (1928) and regarded as the “Father of Aromatherapy”. He discovered the healing properties of essential oils after a painful experience, a laboratory explosion. Badly burnt, he plunged his arm into lavender oil and was healed without scarring. During the First World War he used the antiseptic properties of lavender, thyme, lemon and clove on the wounds of soldiers in the military hospitals. The results were much better than with antiseptic agents in use at that time. In 1937 he published the book, Aromathérapie: Les Huiles essentielles hormones végétales.

Today Gattefossé Foundation shares the knowledge and promotes the use of essential oils in hospital. Aromatherapy is now considered as a complementary therapeutic approach. It also awards every year the "Essential oils and clinical innovations" Prize to a medical team for their scientific and clinical approach to the use of essential oils.

Aromatherapy is now part of the wellness practices in medicine, well-being, cosmetic, beauty, perfume, olfactotherapy and aromachology. We owe to Marguerite Maury (1895-1968) the use of aromatherapy in massages. In the 50s she was the first to use essential oils for therapeutic massage and holistic well-being. She began teaching in Paris and London in the 60's. First published in 1961, her book, 'Le Capital Jeunesse' established the reputation of aromatherapy in France.

#### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Wellness and good life should be for everyone and should be no more a matter of luxury, so the biggest challenge is to incorporate health well-being in education and in an integrative global wellness concept.

#### **5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of "wellness" and "well-being" in your country.**

We have both: Well-being = bien-être, but for wellness there is no French translation (the same applies to the word fitness).

According to COHA (Corpus of Historical American English, the 3 words exist since 1580 for "Fitness", Well-being occurs before 1810 and Wellness is a creation of the 20th century.

Fitness refers to the fact of being in a good physical state (physically fit), and later on to the practice of sport. In France the word was adopted when the gym sessions became popular.

Well-being = the well-being of man, it can be physical, emotional, psychological, spiritual...and material as well. A state of well-being may lead to Happiness.

If we consider Wellness, the word was used in the 60's (1964) designating a state of well-being, but obviously, if the word wellness has been created, it means that well-being was not enough. Since the 80's wellness refers to a new paradigm. In the 90's, in reaction to the stress and the different pollutions, a new vision of life and new lifestyle emerged. And for the well-being's sake, a lot of wellness techniques were created.

21st century the latest form of wellness, the corporate wellness with employee wellness programs is also the heritage of the New Age era.

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# Industry Briefing Papers 2016

## EUROPE: FRANCE

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

In France, we are currently noticing changes in wellbeing/wellness but for the employees. In fact, wellness at work became the last months a big issue.

In spas for example, making spa practitioners happy, will help them to do their work better – and especially make the clients feel good and be satisfied.

In other industries, we have seen physiotherapist perform in factories to help workers with exercises for postural deficiency. Organizing this type of sessions will help employees to do their job in a better way, and for employers to avoid sick leave or worse, depression.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

We can find many different spas in France: thalassotherapy spas (with salt water), thermal spas (with thermal water) and urban/hotelier spas (with tap water). All these spas have their own benefits and they are all trying to differentiate from the concurrence. That is a big challenge for them.

#### Beauty:

More and more people are interesting by thermal products based on thermal water. Beauty boxes that have known a big success are participating to the success of thermal products by integrated some samples in their box. Brands like L'Oreal are also investing in thermal cities (like Saint-Gervais-les-Bains).

#### Fitness:

In France, running knows a big development. More and more people practice this activity, really easy because everybody (businessman, women wanting to lose weight ...) can do it and the only thing you need is: good shoes. A lot of mobile apps are also created on this thematic.

**Nutrition:**

One trend is appearing about a specific diet based on Mediterranean products & food rich in omega 3 and composed by olive oil, vegetables, leguminous, cereals...

**Wellness Tourism:**

in France, wellness establishments (thalassotherapy, thermal centers...) offer additional activities connected to nature, to complete water treatments (mountain walks, yoga on the beach...).

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

In France, the wellness economy is now a big issue and the state is having a look on it. The new significant contribution is the creation of centers dedicated to health & prevention. In fact, the emergence of this type of projects will contribute to the wellness economy: there is a cultural & societal change that is happening, people don’t want to use drugs anymore and avoid medication intake. They are trying to take care of themselves before being sick. Prevention is an opportunity to learn how they can live well.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Wellness economy in France have difficulties to make profit. In fact, salary mass is very important and it is sometimes difficult for companies to make money when hire spas practitioners is so expensive. Work’s regulation in France reduces the profitability.

Following the attacks that France have been victim these last months – it is going to be very difficult to attract tourists from all over the world. Wellness economy counts on wellness tourism but with the current social climate that we know, hoteliers, resorts & spas are going to suffer from that.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Well-being is a term that is more global and that we have to face every day. It is composed by many aspects from the life: psychologist, physiologist, nutritional, social (having friends/family), work (being happy in your job...)

Wellness refers more to the beauty or physical aspects – that we can treat in a spa. Wellness is one part of the well-being.

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# Industry Briefing Papers 2016

## EUROPE: GERMANY

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

This year was an exciting year for wellness in Germany. A trend analysis found that people still try look for opportunities to escape their hectic everyday life. To relax and focus on your personal wellbeing, wellness vacations are still the preferred option, whereas beauty care comes in second. When looking for the perfect time-out the credibility of the product and the service plays the most important role. Mindfulness, as the ability to focus on your personal wellbeing without urging it remains to be the key in wellness for more than four years.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Against all odds the hoteliers of the wellness hotels keep on developing and building spas – investments into spa areas still become bigger, more modern and include more extras.

#### **Beauty:**

HIGH TECH & HIGH TOUCH People are adapting their needs for beauty products on a daily basis- one day they use natural sustainable products, whereas on the other day they want to have a high technical treatment with instant effects.

#### **Fitness:**

Currently, there are three main trends in Germany. People tend to exercise outside, including sports like hiking and biking. Additionally, there is the trend of Self-Tracking through wearables. This helps users to constantly screen and evaluate the functions of the own body to optimize them. Regarding wellness hotels, the users of these Self-Tracking movements want to get a tailored advice in the wellness hotels to bring out the best of them.

#### **Nutrition:**

Using sustainable and regional products is, like in most developed countries nowadays, one of the most important trends in Germany. Further, people like to try

different types of nutrition - eating vegan for a certain timeframe is only one the many examples to give.

#### **Wellness Tourism:**

Usually wellness vacations are planned as a second holiday, next to the main holidays. The duration of a wellness holiday most often varies between two to three days and tourists want to stay in a radius of 200 to 300km to their hometown. While being on a wellness holiday the customer mainly focuses on three aspects: First, they want use their time to relax and rest. Second, they aim to do something for themselves, and third they want to spend time with their beloved ones. In addition, customer needs may vary heavily during their holiday: Some want to focus on Social Wellness, while others prefer Medical Wellness | Healing aspects or slowing down.

#### **Wellness Communities or Real Estate:**

Wellness Communities or Real Estates are not yet considered to be important topics in Germany.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Sebastian Kneipp’s concept of a holistic lifestyle attracted a lot of attention and has a severe impact on the global wellness economy. Kneipp got sick from tuberculosis. The prognosis made him try water treatments, which supported his complete recovery within two years. On this basis he developed a natural healing method that is known as a healing and life concept until today. Associated with the traditional European medicine (TEM) the concept of Kneipp builds up on the five natural elements water, movement, order of life, diet and remedies and is well-known in many countries.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The biggest challenge for the wellness sector (in Germany) is to present this topic in a serious and credible manner. Wellness as a holistic lifestyle is much more than “just relaxing or doing something to feel good”. It is about taking care of yourself with the overall goal to pursue a healthy lifestyle. To achieve the goal of being taken seriously, it is of utmost importance for the wellness hotels to stay informed about the latest trends and coach their staff on a regular basis to keep them on the most up-to-date level in the world of wellness development. Besides, the industry as a whole, including every hotel, has to constantly adapt and develop according to the latest industry standards to attract customers and being perceived as a remarkable and worthwhile experience.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

In Germany “well-being” is a short-time period of feeling good, relaxed or pampered. It can comprise a small moment or a period in life. Being well is a transitory feeling and only perceived on a superficial level. One can understand “well-being” as the first stage of wellness. The term wellness as the second stage describes a long-lasting life-concept with the aim of constantly working on enhancing the overall well-being. The goal of Wellness is to implement a healthy work-life-balance, a high self-competence (or self-confidence) and the willingness to keep on learning and working on oneself. Invigorating, good

For us the best definition of Wellness:

“Wellness is partly a lifestyle and on the other hand an attitude towards life and beyond a philosophy of life. Wellness means to be aware of your inner self and to aim for personal excellence. Wellness is based on having a clear sense of responsibility for our health as well as our quality of life in general. Wellness includes physical, psychological and mental aspects of our existence. A wellness lifestyle is a kind of hedonism. If this is developed and improved with awareness through new experiences, new knowledge and changing conditions, then new perspectives open up in a dramatic way for a good and fulfilling life. This includes personal achievement in areas like fitness, time and stress management and self-esteem as well as a constructive awareness of your inner self. Wellness requires a never ending curiosity for new goals, values and the meaning of life.”

Dr. Donald Ardell - founder of the wellness movement in the US.

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# Industry Briefing Papers 2016

## EUROPE: GERMANY

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

“Go local” is an absolute trend for the moment. The benefits of regional products can easily be communicated and go along with the increasing demand on domestic Spa travel. Germany offers a treasure trove for spa treatments, from wild herbs, goat's milk or wine. Buckthorn berries pure power food, salt from Bavarian mountains is perfect for peelings, and chalk from Rügen island is used for packs or in Rasul bath.

Hop is a new regional best-seller for spa treatments in Germany. He not only has a medical effect but is suitable for many different treatments. Although Germany is known for its hops especially in the beer world, there is a whole new usage and benefit here.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Spas are more and more integrated in daily life.

#### **Beauty:**

Natural cosmetics have never been so hot, and the market is still growing.

#### **Fitness:**

Demand for digital health gadgets is surging – next generation of smart watches and fitness have been the focus at IFA trade show in September 2016.

#### **Nutrition:**

Vegetarianism was yesterday: veganism is the new mega trend in Germany. Up to 1.4 million people live the vegan lifestyle – many of them young middle or upper class members, people who tend to go to restaurants more often, who enjoy life, travel a lot and are willing to spend much of their income for their personal well-being. Only problem: many hotels and restaurants are not ready for the demand yet.

### Wellness Tourism:

Wellness Tourism is growing faster than the regular travel market, and has a strong impact for several regions in Germany – from the coastline to Bavarian mountains.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Dating back to the Romans, bathing has a long tradition in Germany – not only in famous Baden-Baden, but in many places with healing sources. The power and impact of healing waters is still one of the UPS’s of numerous destinations, and no wonder it will be one of the topics of this year’s Global Wellness Summit. But cures paid by public health care have been rapidly declining within the last 20 years. Therefore, hot spring spa destinations are looking for new guests, who want to recharge batteries or to do something for their health.



Left: Bathing fun 100 years ago

Middle: German movie star Marlene Dietrich |

Right: Speakers German Wellness Summit 2016

Germany has been one of the first countries in Europe to start sea side resorts, especially on the coast of Baltic Sea, attracting people with healthy air and the healing power of the sea. Therefore, one of the first “Wellness resorts” in Germany dates back until 1793: Grandhotel Heiligendamm, where we organized a successful German Wellness Summit in June this year.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

In German speaking countries – Germany, Austria and South-Tyrol – the hype on hardware has not stopped yet. “If my competitor is building an infinity outdoor pool, I will start to do the same. If my competitor has two outdoor saunas, I will build another one.” Investments are fine, but the peak in the market has been reached and we are facing the risk of overbuilding. For the moment, we count approximately 1.000.



Wellness hotels and Spa Resorts in Germany, about 900 in Austria and 500 in South-Tyrol. Hoteliers must be careful not too loose the economic aspect. An important issue is costs and efficiency. The future of the industry will be to focus more on the client. He is the most important person in a Wellness hotel. His wellbeing is the center of all intentions. If he is happy and comes back, this will make the property even more successful.

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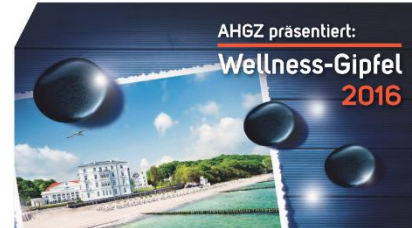
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# Industry Briefing Papers 2016

## EUROPE: GERMANY

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Wellness and all wellness-related topics are still buzz words in Germany, calling for attention on consumer side. "Digital Detox" is popping up more often in newspapers and magazines and is offered in Hotels and resorts as we predicted several years ago. Among professionals the ever increasing lack of therapist is discussed.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Spas have become more accessible and divers. The market consolidates.

#### **Beauty:**

Organic skincare is still on the rise. However, we do see a tiny little trend to "high tech cosmetics"

#### **Fitness:**

Due to the changes in demographics 60+ clients are conquering the Gyms

#### **Nutrition:**

Various nutrition trends are on the rise. There is a growing awareness for "healthy food"

#### **Wellness Tourism:**

Domestic wellness travel has always been strong in Germany. Inbound and outbound wellness travel will increase

#### **Wellness Communities or Real Estate:**

Still no dedicated projects in sight. However, we predict interest on investors side soon.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Germany has a century long history on “Kur” in different ways. Huge parts of what is called “traditional European Medicine” is based on therapies invented in Germany. Such as Kneipp Kur or the herbal medicine of Hildegard von Bingen.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

No doubt the biggest challenge is finding enough qualified staff and retain them. Ever more complex spa & wellness concepts need higher educated therapists. Schools need to keep up pace with these developments and spa operators have to re-think their payrolls.

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# Industry Briefing Papers 2016

## EUROPE: GERMANY

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

It is the sheer size of the industry unfolding right now, before everyone's eyes. Wellness becomes a staple part of your leisure time, of your holidays. In the German speaking areas of Europe, it is rather wellness people speak of than Spa.

One particular word does come to mind, though, and that is Kneipp. This hot-and-cold water treatment, dating back to the 18th century, was long considered outdated and old folks stuff, and it now sees an amazing revival, creating great results, truly measurable, with a minimum of effort. Quite ecological, too.

Like Finland claiming the Sauna as part of its own wellness heritage, Kneipp may once again become a signature treatment for Germany.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

It is a word people get accommodated, too, mainly from staying at one when travelling to hotels and resorts, and it is clearly connected to personal luxury. Be it an urban Day Spa or a destination featuring a branded Spa, the perception will be of a high end experience. This move to a higher level of quality softens the way for better equipment and hard ware investment, and highly trained, skilled staff, working on a level clients expect when paying big Euros.

#### **Beauty:**

Beauty has been the little sister of Spa here, or so to say, still there is development to be seen, too: More brands working with natural materials, and the first avant-garde ones crossing the line to curing and even healing properties, with Voya being a great example.

#### **Fitness:**

Fitness has been around at all times, recent trends point to the monitoring of fitness. Rather than waiting for results to show at some future point, wearables instantly

create a data sheet of your most recent fitness status. This in return points to a higher level of personal responsibility for your own health than ever before.

#### **Nutrition:**

Presently, every discussion about wellness is dominated by vegetarian and vegan statements. The number of those doing without meat is sky rocketing, with the food industry following suit. The trend points to conscious choices for non-meat, and not towards a cover up, with meat substitutes. Even traditional meat manufacturers will add items such as vegetarian cold cuts to their sales portfolio.

#### **Wellness Tourism:**

Wellness tourism is growing at twice the pace as the ordinary travel is doing right now, with the majority of tourists seeking the Destination Spa. Branches of wellness tourism, such as medical travel, have already been established, on a much smaller scale, though, for beauty surgery and dental corrections. It presently shows that the more traditional wellness weekend is growing into a full flung holiday more and more, and into being a family oriented event, from earlier notions of a romantic getaway.

#### **Wellness Communities or Real Estate:**

Only very scarce in Europe, or at least visible to us, will we see the wellness estate or property; this is more often connected to tourism. It certainly makes a sales argument for a property to see, and hopefully, owners will invest in their own private Spa. Asia has known the Club Spa open to tenants in a house for quite some time, we have not seen a true growth of these here.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Kneipp: As already described before, this old, and ( by now well examined) treatment has made its way from the Bavarian mountains to mainstream. Created by a priest, named father Kneipp, it comprises the use of hot and cold water splashes from a hose – and buckets in old times- to spur blood circulation, nervous and lymphic system improvement, detox and other curing effects.

Long confined to his native Bad Wörrishofen, with “Bad” translating into “Spa” (!), this treatment has seen the biggest revival ever. A proper institution has been founded, the Kneippianum, committed to research and future development of new applications.

The co called “Aufguss”, which basically stands for a water pour. It is connected to the finish Sauna, but while in Finland water will be poured onto the hot stove, the Aufguss in Germany has developed into a part of your sauna walk all by itself: The therapist will announce the next Aufguss, and visitors will rush to the room. His job now is to put up a kind of mini-show, swirling towels dipped in fragrance infused

water, dispersing cool water, explaining the effect of a herbal infusion he may be using and so on. This quite entertaining ritual, re-occurring on a regular base like once an hour, is very popular with sauna visitors.

Somehow it hardly made it to countries outside Europe, and remains completely unknown in Asia and the USA. It is very recent that tourists from these countries have made that new experience here and are now beginning to spread the word. Personally, I find it a source of the much needed fun. When it comes to talking about Spa and wellness, it seems that treatments and visits altogether may have a rather sober note, while one global source of wellness at all times has been good humour. Why not have a laugh in the Spa?

#### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Up to now, this industry has been pushed forward by private entrepreneurs who ventured into wellness when no institution really did. These businesses must be protected, and not be inhibited by a plethora of regulations.

The more wellness and Spa become a part of democracy (and demographics), the more local and state policy have to get involved, there are no two ways about it. This can be a blessing, by making wellness an integral part of a country's health system. It paves the way to better funds, for more people to benefit. It may turn into a curse, though, whenever well-meant legislation makes it increasingly hard to operate your business

#### **5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of "wellness" and "well-being" in your country.**

The term wellbeing has a matching translation into German: Wohlbefinden. It is made up of a number of factors which have to come together - given the right balance they create your status of well being: Once all the physical, mental and spiritual elements are lined up perfectly, you as a person can experience a high level of Wohlbefinden.

Wellness, on the other hand, is a word creation not really translating into our language. It has sunken in totally, though, and now is seen as a part of German vocabulary.

The difference to wellbeing is clear: While the latter is a status, wellness is the vehicle, the means to get there. It comprises all elements needed for that perfect status, and in German is not to be mixed with the word Spa: The Spa stands for one more instrument, a detail and an instrument to support wellness.

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# Industry Briefing Papers 2016

## EUROPE: GREECE

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Top Greek hotels are following the global wellness trends by introducing new concepts and using holistic approach in their programs. Elounda SixSenses SPA with their wellness programs and preventive check-up, Amanzoe wellness experiences and guest therapists, Grand Resort Lagonissi with Chenot Method, Costa Navarino, Divani Apollon Thalasso in Athens are industry leaders in Greece.

Opened in May 2017, Miraggio Thermal Spa Resort is a brand new addition to Greek luxury hospitality sector. Miraggio proudly presents the only hydrotherapeutic centre in the world combining the ancient Greek art of water-healing with state of the art facilities. We are offering a holistic approach to wellness, which includes tailored programs for all ages.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

**Spas:** Are trying to develop more advanced programs that bring results.

**Beauty:** Introducing medical treatments in the hotels.

**Fitness:** Bringing classes outdoors, developing trekking and cycling routes, organising retreats.

**Nutrition:** Greeks love experimenting with ingredients and new recipes and you can now find healthy corners in many hotels.

**Wellness Tourism:** Many hotel owners are thinking in this direction, trying to find the right model, which is not easy.

**Wellness Communities or Real Estate:** Not much is going on in this area, but introducing wellness rooms is one of the trends.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Greece has always been associated with laid back and relaxed style of living and vacationing. It has a lot of potential in terms of wellness, but I am not sure it has contributed anything significant to the global wellness economy yet apart from its natural beauty, organic food and ancient healing methods.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

We live in one of the most beautiful places on this planet with perfect climate, a land where growing healthy food, breathtaking views, remarkable places on land and in the islands. One of the biggest challenges is to take advantage of the above by changing our way of thinking in a more creative way to develop the infrastructure and provide our product in a more efficient way. I believe that the crisis the last 6 years worked in that way and citizens and politicians will work to overcome stereotypes and do radical changes to support private investment and creativity. The potential to grow the wellness tourism in Greece is very big, as the “ingredients” are present. What we need is to match them in a more efficient way.

Despite its huge potential Greece is not using and promoting its natural resources enough to become an important player in the global wellness industry. In local mentality wellness is still just a nice word and most of the population does not buy into the concept. There is general lack of infrastructure and investment in this sector.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

I think that Greek people are generally very happy with their well-being. They are spoiled in a good way by the Mediterranean climate, natural beauty of the country and healthy eating choices if you care about what you eat. In terms of wellness, they are definitely far behind. Whenever I see people running in the morning, or having a stretch outside or enjoying their sunset yoga poses, in 90 percent of cases they will be foreigners.

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# Industry Briefing Papers 2016

## EUROPE: HUNGARY

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

After the government has finished the modernization of the traditional thermal bathes in more than 50 cities, EU funds are available for the surrounding of this bathes, making the spa cities healthier and more attractive for wellness tourism. Hungary is traditionally strong in medical and balneological research and innovation reached the spa industry – e. g. there are several research works of the usage of grape and wine products in spa treatments. Hévíz tries to develop itself for the center of excellence of Europe of mud based treatments.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Spas with pool areas are built even for 3 stars hotels in Hungary. Spas separately from a hotel or public bath are still not characteristic, if not an additional element of a fitness center.

#### **Beauty:**

In Hungary the beauty industry has an own network, but we can find more and more beauty services in spas. An important aspect is the increasing bio product developments in this field.

#### **Fitness:**

Sports are traditionally important in Hungary: in 2016 the country has gained 8 Olympic gold medals (ranked 12th among the countries). In the last 5 years fitness has become integrated part of the daily life for the younger generation and the middle classes.

#### **Nutrition:**

Hungary was an agricultural country with excellent agricultural conditions. Based on this manufacturers started to create healthier varieties of their products, even using innovative research to develop functional products helping to create better health.

### **Wellness Tourism:**

Wellness hotels are extremely successful among the Hungarian hotels, always full, because wellness holidays have become very popular, even 10 times a year going there.

### **Wellness Communities or Real Estate:**

Real Estate industry has started to grow from this year with the help of the governmental support for families to built new houses. In few cities (e. g. in Cserkeszőlő) apartment houses with healing thermal water pipelines are under construction.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The Hungarian thermal springs can be really significant contribution to the global wellness economy. Not only the quantity of them (more than 1000) but the quality, the diversity of the waters, the overall high temperature (we have to cool them first, using them for heating the spas). Even more important is the fact that the thermal water and other natural healing elements are traditionally used under medical (scientific) control, as a part of complex medical treatments. The importance of this is increasing because of the shifting of spa and wellness industry from pampering and interesting exotic treatments to evidence based treatments. This is a possibility for Hungary.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The biggest challenge could be the proper relationship between the medical and the wellness industry. In Central Europe it is definitely typical for the big medical tourism centers to do professional healing work but they became famous as bath cities. At the moment the medical tourism in Hungary operates small and medium sized surgeries. Its base is the competitive price/value rate which is obtainable here. Based of the brand and facilities of these spa cities it will be possible to expand these fields towards the motion sickness and rehabilitation, which are overlapping the wellness industry.

On the other hand it is important for the country to develop successful complex spa products and brands instead of importing them from the more developed countries.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness mainly means visiting spas and wellness hotels, well-being means mainly

healthy nutrition and sports for an average Hungarian. The convergence of the two topics has begun for a few years.

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# Industry Briefing Papers 2016

## EUROPE: ITALY

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

As a small pioneering enterprise in organic cosmetics, our knowledge of the market is of course limited. We are mainly concentrating on the Alpine region and which cannot be representative of Italy as a whole.

We observe a great desire for sensible and sustainable consumption not only for wellness products and treatments but in all market segments. Solution-oriented offers in specialized establishments and sophisticated concepts that guide the entire enterprise and can be comprehended by the customer are certainly the big winners on the market. Well implemented, unique and authentic offers are being increasingly sought by international and regional guests.

Generally, one can observe a strong tendency towards regional, Europe-focused tourism as more and more destinations are being considered insecure.

Another important point is the sanitary relevance of individual offers that reaches far beyond merely cosmetic aspects.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

A clear reduction and condensation of the offer matching the positioning of the hotel.

#### **Beauty:**

Organic cosmetics are still trending and are considered a growth market especially for big enterprises.

#### **Fitness:**

A strong focus on summer outdoor activities in order to convert seasonal structures into whole-year ventures.



**Nutrition:**

Nutrition concepts are being increasingly linked with the over-all offer of a hotel. Organic, sustainable, healthy – regional, high-quality, varied.

**Wellness Tourism:**

Increased emergence of regional guests. Constant demand for holistic offers.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Functional (result-driven) wellness was born in the Alps, particularly in Austria.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The rotation of employees and their training are big challenges and therefore constitute the biggest risk in guaranteeing continuity in the implementation of well-defined hotel concepts.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Well-being – from the Italian ben-essere – is a far more comprehensive concept than wellness. In contrast to the typically passive enjoyment, we conceive well-being as a holistic, location-independent lifestyle. In our case this means a combination of Mediterranean serenity and Alpine clarity. The perfect synergy and a holistic answer.

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# Industry Briefing Papers 2016

## EUROPE: ITALY

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Spas are now more popular; spirituality is a theme that is starting to get popular too even if it's still imagined as something religious-mystical-complicate-dangerous not as "living in the moment, being truly natural or balanced with one's true nature". The psycho-spiritual Spa dedicated to the body that we've launched is appealing for the press.

Natural medicine and prevention are still fighting to be considered but it's better than before. The lightness and poetry proper of a Spa are getting lost a bit, there's a lot of confusion, improvisation and the tendency to offer a bit of everything so a coherent Spa concept results as particularly interesting.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

More sensitivity towards an emotional and psychological approach not only the classical medical thermal spas.

#### Beauty:

True organic gets more popular and INCI is now more checked before buying, I hope that poetry in beauty will survive.

#### Fitness:

Yoga gets popular and also a more natural approach to sport

#### Nutrition:

Italian food is very famous and many chefs start researching and studying the healthy content of food with innovations and creativity.

#### Wellness Tourism:

Still not developed

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The Italian lifestyle: mood, food, approach to life, arts, beauty & fashion, music, family, nature can be combined in an effective, attractive, touching and moving way of living a wellness holiday that can be experienced to free talents, creativity, joy, positiveness and vitality that can be then experienced everywhere.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Beauty training schools are poor and old both in the approach to job and guests and in the teaching of the basics. Training for massage therapists is too complicated and not available as a one/two year course of Spa Therapist for example.

People still go only for massage when they feel pain or to a very general sense of relaxation not to live healthier before having a problem. Psychosomatic, balance body & soul, mindful living, authentic attitude towards our true nature are still seen as “new age” but there’s some more interest and openness.

People still expect therapists to be female and I think this is a big limitation, a risk and a discrimination.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness feels like looking healthier and fit through external tools (massage, fitness, water, products) Well-being is an inside job like happiness.

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# Industry Briefing Papers 2016

## EUROPE: ITALY

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

As a non-profit entity, the Giovanni Lorenzini Foundation (GLF) promotes and reports on evidence-based knowledge in Health and Wellness internationally.

The most cutting-edge in the prevention of NCDs worldwide is emerging in the concept of the The First 1000 Days, as the first line of prevention. The program represents a groundbreaking integration model for the prevention of Non-Communicable Diseases (NCDs), designed for implementation in real-world settings; and represents an unprecedented holistic “bio-psycho-socio-systems perspective” – as the first line of disease prevention.

The program focuses on the identification and application of effective prevention interventions through multi-disciplinary approaches including clinical/molecular evaluation (genomics, epigenetics, metabolomics...), empowerment/education of individuals and health and wellness professionals, and use of portable devices for application in public/private Health & Wellness sectors.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

A fundamental reframe on prevention as pre-emptive and predictive, leading to a personalized Wellness approach.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Key global stakeholders, in the field of the Developmental Origins of Health and Disease, need to bridge the gap between research and the application of evidence-based processes to real world needs. In facilitating this process, a systemic shift can occur in the approach to chronic disease prevention, and the promotion of Wellness lifestyles.

#### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The lack of a holistic understanding and education about environment and behaviours that cause disease, and the dissemination of evidence-base knowledge about prevention.

#### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

##### Wellness (originally known as High-level Wellness)

“Wellness can be approached from at least two related perspectives. 1. Prevention—the practice of behaviors that minimize the risk of lifestyle related diseases and disabilities. 2. Holism — the integration of the mind, body, and spirit for optimal functioning.”

John Travis, MD, MPH (2004)

The concept of Wellness (as High-level Wellness) was originally developed by Dr. Halbert Dunn in the 1950's – a leading figure in establishing a national vital statistics system in the United States.

In 2004, John Travis, MD, MPH (2004), published that it was envisioned by the term's originators as a multidimensional concept incorporating the physical, mental, emotional, and spiritual aspects of a human being.

Halbert Dunn, MD, identified five dimensions of the total person: emotional, social, intellectual, spiritual, and physical. When these aspects are fully developed and integrated, optimal well-being results which, he called a “zest for living” (Dunn, 1961). Dunn further proposed that Wellness is a process, a way of life; it is not a state that can be achieved once and for all.

##### Well-being

“There is general agreement that at minimum, well-being includes the presence of positive emotions and moods (e.g., contentment, happiness), the absence of negative emotions (e.g., depression, anxiety), and satisfaction with life, fulfillment and positive functioning. In simple terms, well-being can be described as judging life positively and feeling good.”

CDC

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# Industry Briefing Papers 2016

## EUROPE: LATVIA

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

The “awakening” and recognition of one of the oldest Latvian traditions, the pirts-Latvian bathing ritual. It is a holistic and complete wellness experience in itself. This living heritage is continuously being embraced by new generations and visiting guests.

Wellness travel is the second largest segment after MICE in tourism, and developing this industry is a priority for the Latvian government, building on the rise of popularity of medical and wellness tourism, more so, the country is very well positioned to offer an effective blue-print for what so many people are looking for, to cope well in today’s world; heritage, rich natural healing sources, expertise and service.

The traditional kēmeri spa resort, established in the beginning of 19th century, located in a national park, rich in bogs, peats and mineral waters, stagnant for the past 20 years, is being redeveloped to the first wellness community in the Baltics, setting a new destination on the map for wellness travelers.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

An expanding market, gone mainstream with dozens of local day spa openings, residential spa’s becoming a “must-have” for luxury segment developers and additionally Riga welcomes international operators, with new openings in 2016, Pullman by Accor Group (opened in June) and Kempinski (planning to open autumn/winter).

#### Beauty:

The topic of this years “Baltic Beauty” conference held in November is “complementary therapy and profylaxis” reflecting the readiness amongst beauty therapists, and demand from consumers, to embrace alternative practises and naturopathy when it comes to beauty.



**Fitness:**

Functional training, outdoor activities, fitness and well-being retreats are in highest demand, driven by consumers seeking a holistic approach, and practice physical activities for health not merely for sporting a beautiful body.

**Nutrition:**

Watch for the expansion of the Nordic cuisine and the establishment of the Baltic diet, as an alternative to the Mediterranean diet, dictated by the vast natural innocence, whereby 40% is still untouched forests, rich in wild life and harvest and where a natural way of organic, farm to platter culture prevails.

**Wellness Tourism:**

Today there is still vast international ignorance on strong health giving credentials of Latvia, however, this is about to change, as wellness tourism is becoming a priority and a strategy aligned with the ministry of tourism.

**Wellness Communities or Real Estate:**

In the leading Baltic real estate and development forum, held in September, organized by FIABCI, for the first time an award for the best “wellness residence” concept will be nominated, and “wellness communities as a trend in development” will be presented as a keynote.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The advancement of Balneology and natural medicine in the past, the advancement of wellness medicine in the future.

In 1838 one of the largest balneology center was established in Kemeris and quickly grew from a fishermen's village to a fashionable retreat, local residents and visitors from Germany, Russia and Scandinavia, blended interest in mud, mineral waters and sea air with exposure to ground-breaking natural treatments of the time. Later a research institute was set up to produce research in real time, alongside the operations of the balneology center and health resort, dedicated to the study of natural medicine and the effects of the natural sources, their use in holistic programs and the development of new methodologies. The institute produced scientific journals and a book has been published summarizing the results of the 30 yearlong studies including climate therapy, mineral waters and peat mud. A modern research institute is set up to continue the tradition of researching ground-breaking technology for understanding and reversing health conditions. The vision is to legitimize in a modern sense, the natural healing sources, creating evidence-based treatments and programs, that will provide effective lifestyle changes.

#### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

To modernize the deep rooted heritage and application of natural medicine in such political and economic environment of instability and insecurity, that directly affects the travel market, access to European and structural funds that will dictate the success of the advancement of the wellness economy. Vast investment is needed to the development of the infrastructure, technologies and evidence based methodologies, this can only materialized in collaboration between private companies and state departments.

#### **5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of “wellness” and “well-being” in your country.**

Wellbeing- Refers to a state whereby one is experiencing total balance physically, mentally, spiritually, financially and socially.

Wellness- Refers to a continuous process of reaching an ultimate state of well-being, yet there is no exact word for wellness in Latvian. Wellness is often mistaken for “pampering”, spa or beauty treatments in the general public.

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# Industry Briefing Papers 2016

## EUROPE: LITHUANIA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Wellness tourism is rapidly gaining in Lithuania. More and more local and foreign visitors come to relax, recuperate, for wellness. Wellness tourism attracting. Some of the SPA centres were selected or nominated as one of the leading medical/resort or destinations SPAs in the region. The quality of the air in some of SPA Towns was measured and noted by international experts, it being one of the purest in recreational Towns in Europe. The quality of mineral water and the composition of microelements is not only unique, but having a rather high proportion of calcium, which is easier absorbed in our bodies. Which is rarely found across Europe.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

International recognitions, tournaments and high quality cosmetic brands.

#### **Beauty:**

High Tech

#### **Fitness:**

General understanding within the community of health benefits, related to movement.

#### **Nutrition:**

Slow food, locally harvested

#### **Wellness Tourism:**

Tourism: Visibility on Medical tourism map.

#### **Wellness Communities or Real Estate:**

NA

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Forest bathing, mineral water baths and amber treatments, therapeutic mud.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Lack of country marketing and visibility; Transportation.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness- for improving one's health, Well-being – for maintaining one's health.

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# Industry Briefing Papers 2016

## EUROPE: POLAND

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

More and more people are consciously looking for peace, harmony and contact with nature. They desire places where they can deal with stress and take care of their health, learn about well-balanced nutrition and match physical activities for themselves. Wellness travels are becoming a part of preventive healthcare.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

The amount of conscious SPA customers is increasing and people are using SPA as an investment in their health.

#### **Beauty:**

With the growing wealth status of Poles we can see the increase of interest in esthetic medicine (+15% y/y).

#### **Fitness:**

The boom of common sport practice is seen for couple of last years. Mainly jogging and bike riding but on the other hand also gyms are having second-life. Gyms are introducing cross-fit and kettlebells activities. Yoga classes are also becoming very popular.

#### **Nutrition:**

Healthy and hand-made are on top. Consumers carefully reading product labels, very conscious about food allergies and intolerances. Increasing interest in Detox, slimming holidays, gluten free diet and vegan.

#### **Wellness Tourism:**

Wellness Tourism is becoming family affair and treated as an investment in holistic healthy living.

### Wellness Communities or Real Estate:

Increasing number of housing estate (mainly new projects in top locations in big cities and holidays destinations) with swimming pools and gyms included. Developers are seeking for places with green surroundings, pollution-free air and quiet.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

We have 45 government certified SPA cities with specific climate, nature values and quite long tradition. Balneology and physical medicine are most recognized in Poland.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The biggest challenge is paying attention to the highest quality of wellness services and becoming confident and professional partners abroad.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Well-being is a state, Wellness - part of the way to achieve it. Well-being depends on health, happiness, harmony and relations. Both words are rarely used in polish and moreover are difficult to translate so that everyone can understand. The same problem with terms: Corporate Wellness, SPA, SPA cities, detox, holistic.

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**PROVITA**  
WELLNESS HOTEL





# Industry Briefing Papers 2016

## EUROPE: SPAIN

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

#### ISO / DIS 17679 - Tourism and related services -- Wellness spa -- Service requirements

The international standard of Wellness Spa, a project led by Thailand, has been approved in Spain by the Spanish technical committee supervised by ICTE-CTN186 Institute for Spanish Tourism Quality - and predictably, will see the light as an ISO standard before the end of 2016. This is to normalize the activity and characteristics of the spas, thalassotherapy, wellness and mineral springs facilities including its internal management, services provided, the additional requirements of the restaurant business, water resources and their treatments, healthy services, among which are the thalassotherapy, Spa and Wellness resorts, and mineral springs thermal centers.

#### The biggest hospital of traditional Chinese medicine of Europe will be in Barcelona

An agreement signed between the municipal government of Beijing (China) and the government of the Generalitat de Catalunya including the creation of the European Centre for Development and Promotion of Traditional Chinese Medicine (TCM) in addition to the launch of a Master specialty, coordinated between the university of Chinese Medicine Beijing, UB (Universitat Barcelona) and UPF (Universitat Pompeu Fabra), which is scheduled to start in September 2016. For the Chinese government, Spain is one of the countries with the highest growth potential in MTC, since the use of natural therapies in combination with western medicine is gaining ground strongly in recent times. An investment is estimated at € 80 million.

#### The mineral springs thermal center are updated

Some resorts, such as the hotel group "Castilla Termal Hoteles" bet on high-quality spa tourism away from social, and on the economic and environmental sustainability, joining in the same model hydrotherapy and culture, history and health. His offer, addressed to all types of customers, offers much more than healthy treatments: tastings, concerts, entertainment, accompanied by a cuisine based on local products. They sell its services in European countries, as well as, in Mexico or in the United States, with the aim that foreign tourism represents 20% of its customers in the short term.

## **Health & wellness Tourism**

Health & wellness tourism is becoming increasingly important in Spain. As The Ostelea School of Tourism & Hospitality reveals, the revenues from this sector amounted to 419 M € in 2015, registering an average growth of 6,2% since 2012. 2020 is expected to increase 58%, which would reach 1,000 M €. Spain is listed in twelfth position in the world ranking.

## **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

### **Spas:**

The ability of Spain, to develop distinguishing and high-quality wellness offers associated with tourism, is very large. For example, the recent opening of the spa SANTUARIO LE DOMAINE, ABADIA RETUERTA LE DOMAINE, one of the best bets of wine tourism in Spain. This innovative and cozy sanctuary of holistic and wellness therapies has almost one thousand square meters of ultimate luxury facilities. An innovative concept of wine therapy based on a blind tasting, and a menu of signature treatments. The first "Spa Sommeliers" in Europe that guide guests in their wellness journey, and the maximum level of customization and the service of a spa major-domo that help them at any time during the experience. It is one of the most sustainable and energy efficient spas in Spain.

### **Beauty:**

The seal of Spain Luxury Beauty is created with the intent to develop and promote the market for luxury beauty made in Spain at national and international level. Its main challenge is to turn the beauty industry into an ambassador for our country, like the Spanish Cuisine. Cosmetic products made in Spain are present in more than 170 markets; The Spanish cosmetics conquered the world with a cumulative growth of 50% over the last 6 years of exports and the industry invests an average of 120 M € per year in R & D+I.

### **Fitness:**

The gym industry has to grow back after a fall of 6 consecutive years and remains among the most important in Europe - the fifth most important market in Europe by volume of income -. The model of "low cost" gym has been one of the keys that have enabled the sector out of the crisis. In addition, Spain is the fastest growing European market trend of Cross fit, way of specialization and business innovation.

### **Nutrition:**

The prevalence of obesity in Spain: we are leaving very quickly the traditional Mediterranean diet. So, we are witnessing campaigns and initiatives to raise awareness of the importance of nutrition and healthy lifestyles. For example, the Alicia Foundation, a center with social vocation and open to everyone, is dedicated to technological innovation in cooking, to improve eating habits and the assessment of the food and gastronomic heritage. Its main objective is that everyone eats better.

### **Wellness Tourism:**

Gran Canaria Spa, Wellness & Health, a public-private initiative, has managed to promote and consolidate the island as a destination for health and wellness. Today, it is a success as Health & Wellness brand internationally.

### **Wellness Communities or Real Estate:**

There is no Project of wellness communities in Spain for the moment like some in UK or United States, or Asia.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Honestly, I do not think so. However, I am convinced that Spain will participate more actively to the growth of the global wellness economy in the future. The sector has started to develop, but it’s not consolidated. The Wellness culture or Wellness tradition almost does not exist as in other neighboring countries such as France. Today, we are witnessing an awakening of Wellness with, for example, the development of alternative medicines, herbal medicine, massage techniques, etc., and in a natural way with the arrival of foreign tourists in search of this type of product. It is true that there are mineral springs centers since the nineteenth century, however, until today, mainly offer some benefit programs for the elderly managed by the government of Spain.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The biggest challenge is to enhance the Wellness sector in Spain and we will be able to do only through the education of the staff and the consumers. It is essential to professionalize the sector supporting the training and increasing the level of the general competences and professionalism to all involved in the sector, such as therapists, hoteliers, spa manager, etc. Hoteliers have to understand the importance of an excellent management of the spa and that is achieved by hiring trained and qualified staff. The quality of service is the key factor of success.

For many years the spa was positioned as a luxury product and “a craving”. The crisis has led to a change in consumer habits of the vast majority of Spaniards and a price war settled with a poor quality of the treatments. Today, we must communicate very well the healthy benefits to the consumers. It’s important that the wellness treatments are affordable without losing sight of the quality and healthy benefits: Democratizing without making vulgar. Therefore, government support is vital to build a solid foundation in the industry.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

To my point of view, this difference is not perceived in Spain. For most people, the word “Wellness” does not have a precise meaning. They do not know how to define it. It is also much misused.

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esthetic  
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# Industry Briefing Papers 2016

## EUROPE: SPAIN

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Spain is fast becoming the premier European destination for both health & medical tourism and spa & wellness holidays. Health tourism is growing at a rate of 20% per year.

The excellent reputation of its hospitals and clinics, the high level of its professionals, its spas and health resorts and the most modern treatments make it the destination of choice for health and wellness tourism. The cultural, sport and leisure offer, its cuisine and Mediterranean lifestyle mean it is the perfect place for relaxing and recovering from any condition.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

**Spas:** It is not just international tourists but even domestic tourists that are increasing the number of thermal spa holidays or health-related trips they take within Spain. The welcoming of a new face of tourism will open up plenty of opportunities to tourism industry professionals and allied businesses.

**Beauty:** With the country having a higher number of people of an older demographic, Spain's beauty and personal care market has been impacted in a positive way. A demand for natural cosmetics is growing, as consumers are making natural products for beauty and hygiene a focus point in their purchase.

**Fitness:** Spanish citizens are among Europe's most fitness-conscious, with some 4.9 million people signed up to gyms. The low-cost gym model has allowed the fitness industry to ride out the crisis.

**Nutrition:** Increasing awareness of food allergies and intolerance drives sales of food intolerance and organic products.



**Wellness Tourism:** The rise of health tourism in Spain over the past years has given the Spanish tourism industry a wakeup call to start making active efforts to capitalize on a sector that is all set to be the future of tourism in Spain. Spain has one of the best healthcare systems in the world and has been awarded with the 7th rank by the World Health Organization in this regard. This, in addition to factors like easy accessibility, affordable treatments, excellent hospitals and clinics and English-speaking medical professionals have led to the country being seen as one of the top medical tourism destinations.

**Wellness Communities or Real Estate:** Spain is the world's 2nd largest tourist destination for residential tourism, where foreigners acquire a second residence. Spain Health System is ranked 7th best in the world and the country has the 8th best life expectancy. Factors such as the most European citizens are covered by the Spanish public health, the very easy going life style, the Mediterranean diet and the excellent climate, are extremely important for people leaving their home land, particularly for those who have retired. Spain represents, for the northern European "baby boomer" the most suitable alternative when buying or renting a retirement home, second home or future retirement home, in terms of a fully integrated Active Lifestyle and Wellness Style real estate offer. The concept of "European Florida" occurs in the south of Spain.

### **3. Our theme this year is "Back to the Future." What do you feel is your country's most significant contribution to what is now a global wellness economy?**

A global study by the World Economic Forum has found Spain has one of the most competitive tourism industry in the world. The report takes into account indicators measuring elements such as a destination's natural and cultural resources, its health and hygiene conditions, its travel infrastructure, its security levels, its price competitiveness and its adaptation to new technologies. Many will know Spain as an excellent holiday destination, home to beautiful beaches and a warm climate. However it also happens to be home to some of the best spas in the world. Spain offers everything - pampering spas, minor cosmetic surgeries, detox and weight loss packages, sleep clinics, stop smoking and other programs to get fit and active. There are spas that are built atop healing thermal waters and others situated right along the beach. Spain truly can provide a spa holiday to suit anyone and everyone.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

During the last decade, Spain experienced a big boom in terms of the number of spas and wellness centers in the market. However, this development in terms of quantity was not matched in terms of quality of services and treatments. It is essential to improve the training of professionals. Not only at the therapist level but also at the management and investment levels.



**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness is the state of being healthy in body and mind (positive mental approach, correct nutrition, physical movement)

Well-being is a wider concept, meaning living a satisfactory life by being health, prosperous and happy. So we may say that Well-being includes the concept of Wellness.

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# Industry Briefing Papers 2016

## EUROPE: SWITZERLAND

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Topics that are making news are for example certification and wellness labels, medical wellness, healthy lifestyle, health promotion and prevention programs, sustainable and local products and services, importance of sleep quality during holidays as well as marketing of wellness.

Recent interesting projects and investments are among others the emergence of a premier resort Bürgenstock Resort Lace Lucerne (including for example three luxury hotels and an alpine spa as well as numerous restaurants), the renovation of Therme Bad Zurzach (focus on families) and the opening of Deltapark Vitalresort by Lake Thun. Deltapark Vitalresort combines spa, fitness and health check-ups and is an example of the beginning trend in Switzerland that medical wellness offers are complementing traditional wellness offers. In addition, hospitals are planning to open patient hotels. Centre hospitalier universitaire vaudois in Lausanne, for instance, will be opened in Autumn 2016. This is another example of the shift towards holistic health and wellness concept.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas / Beauty / Fitness / Nutrition:**

Wellness doesn't simply mean a beauty treatment but is understood as a holistic concept. Both service providers and customers are paying attention to natural, pure and local products and services. Also, medical and evidence-based components are gaining importance. Two key words here are nature and evidence.

#### **Wellness Tourism:**

Certifications and wellness labels: For example hotelleriesuisse, an umbrella organization of regional hotelier associations, recently renewed its specialization categories. A hotel can now apply for the following wellness specialization categories: "Wellness" "Wellness & Spa" "Medical Wellness" "Medical Wellness & Spa". Also Swiss Tourism Federation is renewing its label "Wellness Destination". In

both cases, there is a tendency towards the idea that hardware (infrastructure) follows software (services) and not the other way round. This means that a company first needs a strategy as a base before they should build infrastructure. That is the attitude that successful wellness needs, isn't it?

#### **Wellness Communities or Real Estate:**

Discussions are going on how stakeholders could come closer together for example by forming a cluster.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Switzerland is known for fresh air, pure water, alpine flora and beautiful mountain scenery. Natural remedies and traditional approaches (for instance Traditional European Medicine) have been and are important part of wellness. Switzerland has contributed to a global wellness economy by understanding the value of these natural resources and by developing a holistic view on wellness.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The biggest challenges are finding employees with high professional and social competence, dealing with the guests from completely different cultures as well as difficulty of marketing holistic wellness offers and services (healthy ≠ enjoyable).

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

There is no great difference between the two terms in the everyday life. The term “Wellness” (including well-being) is commonly used in Switzerland in wide range of situations.

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**HOCHSCHULE  
LUZERN**



# Industry Briefing Papers 2016

## EUROPE: SWITZERLAND

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Private label dominates competitive landscape

Overall health and wellness continues to be led by private label products from retail giants Migros and Coop. While Migros led health and wellness packaged food and beverages up to 2015, branded manufacturer Coca-Cola also plays an influential role, and ranked second in health and wellness beverages in Switzerland in 2015, as the company enjoys a very strong position in BFY reduced sugar beverages. In addition, domestic multinationals Emmi and Nestlé held significant shares and were among the top five health and wellness companies in 2015, followed by a reasonable value share held by the international giant Mondelez.

Nestlé's New CEO To Drive Focus On Wellness

VEVEY, Switzerland — Nestlé has named Ulf Mark Schneider as its next CEO, as the company prepares to shift its focus towards nutrition, health and wellness.

Joining Nestlé on 1 September 2016 for an introductory period, the current boss of German healthcare group Fresenius will concentrate on accelerating Nestlé's journey to become the world's preeminent nutrition, health and wellness company whilst fostering Nestlé's values and principles.

The interior ministry has announced plans to give five complementary therapies including homeopathy the same status as conventional medicine. Homeopathy, holistic medicine, herbal medicine, acupuncture and traditional Chinese medicine will acquire the same status as conventional medicine by May 2017 when it comes to health insurance.

Switzerland welcomes new-age wellness

There are a variety of reasons why a Middle East traveller would visit Switzerland for wellness and medical reasons. There are a variety of private hospitals, spas, wellness centres and clinics and with an emphasis on quality in an environment that lends

itself to general wellbeing, the Middle East traveller will have plenty of options across Switzerland.

“About 5-10 per cent of the wellness business is covered by people from the Middle East,” reports managing director Gregor Frei of Swiss Health. “During the last three years an annual increase of about 20 to 50 per cent (mainly from the GCC countries) has been reported. Hence, Middle Eastern guests and patients are becoming more and more important for Switzerland.”

**2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

**Spas:**

Switzerland protects its waters and spa culture with strict regulations concerning its quality, which have led to such positive development that, in some places, you can drink straight out the lake without second thoughts.

**Beauty:**

The Swiss government has confirmed that it will ban the sale of cosmetics, containing ingredients tested on animals.

**Fitness:**

Swiss schools commencing even at kindergarten level have created more initiatives in fitness programs and activities to create an early awareness in wellbeing.

**Nutrition:**

A large percentage of Swiss consumers attribute great importance to environmentally friendly and locally sourced, organically grown food and beverage products, with “Swissness” and regional bearings.

**Wellness Tourism:**

Switzerland is one of the most expensive countries in the world for medical and health tourism ranging from medical spas, IVF treatments to neuro, cosmetic, weight reduction and orthopaedic surgery but its high reputation continues to attract tourists for these purposes, especially those more concerned about quality than price.

**Wellness Communities or Real Estate:**

Safety is a big part of wellness and Switzerland’s traditional role as a safe haven in times of global instability has attracted overseas investments into Swiss bricks and mortar.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Switzerland’s healthy climate, alpine fresh air, mountains and lakes, is an attractive

package when it comes to wellness and medical tourism and recent figures indicate it is only going to get more popular. There are a variety of private hospitals, spas, wellness centres and clinics all with an emphasis on quality in an environment, which lends itself to general wellbeing.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

A central trend in Swiss hospitality is raising traveller interest in health tourism, for both medical services and wellness tourism. A number of hotel companies who plan to expand their activities in the area of health tourism are facing challenges, such as the lack of qualified staff and current work regulations. The state collective labour agreement in the hospitality industry leaves too little flexibility when it comes to wages and salaries. Value added tax is perceived as complex and time-consuming, and the lack of qualified workers is already a challenge today: the great majority of personnel are recruited from nearby countries outside the European Union.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness to me is methods and systems, which can be used for the purpose of improving or maintaining a state of wellbeing. As an example, Yoga and Ayurveda offer a system of wellness, which can be used to enhance one’s state of wellbeing. To me the term wellbeing refers to being well. The question can be asked ‘What is your state of wellbeing?’ It can be an assessment of one’s state of being. This can encompass one’s emotional, physical mental or spiritual state of being.

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# Industry Briefing Papers 2016

## EUROPE: THE NETHERLANDS

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Dutch consumers' interest in healthier food and beverage products continues to strengthen, and when budgets allow, they remain keen to purchase such products. Consumers shifting from some BFY products to organic, favoring more natural flavors and ingredients. Examples: alternative small scale supermarkets such as Marq't with only organic products, sourced from local producers, juice bars, cafeterias at school and at work places serving healthier food.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Spas are offering an ever more 'holistic' approach to their clients offering a total well being concept.

#### **Beauty:**

Volume growth in beauty and personal care in 2015 was generally strong in most categories. International brands in the Netherlands continue to dominate and in line with the natural look trend, categories associated with maintaining a well-groomed and attractive look outperformed products which generally achieve artificial results.

#### **Fitness:**

Fitness is the biggest sport of The Netherlands (membership of fitness clubs as % of total Dutch population: 17%). In June 2016 the first chain of fitness centers Fit for Free went public through an € 800M IPO.

Gyms offering discounts, long opening hours or special programs, as well as luxury wellness centers are doing the best. The middle segment and independent fitness centers are struggling.

#### **Nutrition:**

The Netherlands offers a broad spectrum of organically produced products, also evidenced in the vibrant organic and natural stores in the countries' main cities (Amsterdam, The Hague, Rotterdam, Utrecht).

### **Wellness Tourism:**

The Netherlands is not exactly known for its wellness tourism (although in the old days the sea water in for example Scheveningen was considered for water curing)

### **Wellness Communities or Real Estate:**

Rotterdam is the most important port for organic products from faraway countries. Offering good value for money, great planning and effective logistics, the Dutch organic industry has developed into a key partner for both national and international wholesale and retail firms.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Good work-life balance is generally accepted and employees actively cooperate to make this happen: working from home, part-time contracts, on premises child care etc.

Children’s well-being is reportedly one of the highest in the world, jointly with the Nordic countries (Norway, Sweden, Denmark).

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Despite an improving economy, protracted economic uncertainty, refueled by the outcome of the recent Brexit referendum, means spending and margins remain under pressure.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness to me would be using recreation, hobbies, exercise, balanced nutrition, taking a positive outlook and incorporating a philosophy of balance between personal and professional life in order to obtain a better shape physically and mentally, resulting in overall well-being.

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# Industry Briefing Papers 2016

## EUROPE: TURKEY

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

As a founding voice in the world of holistic wellness, Canyon Ranch has the expertise of spending nearly 40 years helping our guests achieve wellbeing. But 2016 marked the first time we've brought our integrative approach to wellness to the global stage with the opening of our first international property, Canyon Ranch Wellness Resort at Kaplankaya, Turkey.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

When preparing to launch our brand in an international space, we recognized the importance of understanding our global consumer, particularly in Turkey given that the concept of transformative wellness in a land of ancient healing is gaining in appeal year after year. Therefore, the following notes reflect Turkish perspectives on varying wellness sectors, gathered in our most recent research.

#### **Spas:**

Turkish consumers seek total relaxation from spas. They expect their spa experience to be both luxurious (signified by clean, simple aesthetics and thoughtful treatments) as well as total relaxation.

#### **Beauty:**

Turkish culture has a high regard for medical grade beauty regimens (not fad type products) and are attracted to global brands that have proven results. Beauty emanates from a rich Mediterranean diet, fitness easily integrated into daily life and regular escape vacations that are stress free and relaxation driven – their life balance is more mature and preventative focused than traditional western cultures.

#### **Fitness:**

Turkish consumers define fitness by how well they age. It's an everyday preoccupation that is easy to incorporate into daily life and is seen as an intrinsic element of wellness – both practically and perceptually.

**Nutrition:**

Turkish consumers have always benefited from a diet that focuses on Mediterranean culinary offerings. Their diet is historically based and timeless.

**Wellness Tourism:**

The notion of 'simple wellness' is something that is understood, achievable and easily fits into one's daily life. However, complete (or integrated) wellness which is a more complex version of wellness that the Turkish culture believes is difficult to achieve. Simply put, "keeping one's self healthy" can be achieved every day, but complete wellness, "being relaxed", is harder to achieve.

**Wellness Communities or Real Estate:**

This is an evolving concept in Turkey but one that is quickly being embraced by both younger and more mature demographics. Canyon Ranch Wellness Resort at Kaplankaya includes a significant residential component.

**3. Our theme this year is "Back to the Future." What do you feel is your country's most significant contribution to what is now a global wellness economy?**

The region is not only breathtaking in its natural beauty, surrounded by significant ruins and archeological sites, but has also been a center of healing since ancient times. The confluence of stunning landscape, rich Mediterranean history and thousands of years of healing tradition, have influenced the selection of services and programs we have available. The cornerstone of health has always stemmed from the significance of the spa and role of the Hamman.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Clearly, the current geopolitical situation in Turkey presents the biggest challenge to growing the economy, not just in the wellness sector but in every sector. We are fortunate to have partners that understand the domestic climate and fully embrace the Canyon Ranch Vision. In times of uncertainty and political strife, people need a safe haven to destress, relax and reflect which is what Canyon Ranch's foundation is solidly built on and continues to be a cornerstone for our success.

**5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of "wellness" and "well-being" in your country.**

In Turkey, simple wellness speaks to being healthy, eating healthy, getting enough sleep, being active in fitness and utilizing massage/Hamman and incorporating the above into everyday life. However, wellbeing is less frequent. What is harder to achieve is total relaxation and escaping the everyday stresses of life.

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CANYONRANCH®



# Industry Briefing Papers 2016

## EUROPE: UNITED KINGDOM

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Currently making news in the UK is The Power of Touch - a not for profit organisation educating the industry on treating Cancer patients and not discriminating against them by excluding them from treatments (Tpot.org.uk). One of our product lines at The Balmoral is Spiezia (our hotel in Edinburgh), who have been developing new treatments along these lines. We already have the 'Head in Heaven' treatment from Spiezia which we offer to Cancer patients and there is a possibility to work with them further on Cancer Touch Therapy treatments and facials.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Beauty:**

- o Micellar cleansers
- o Korean beauty trends of multiple layering of facial skincare products - going way beyond the classic cleanse/tone/serum/moisturise - they now have in excess of seven layers,
- o Kale skincare

#### **Fitness:**

- o Electrical Muscle Stimulation (EMS) (20 minutes of EMS training equates to 3 hours of conventional workout)
- o Rise in an array of classes with things such as class pass to make it easy to mix up training sessions (spinning to music; Barry's bootcamp; reformer Pilates; Bikram Yoga; Boxercise, etc.)
- o Rise in people regularly exercising

#### **Nutrition:**

- o Zero noodles, Raw Vegan deserts, Gluten free, Dairy free, cold-pressed and so called Clean eating all continue to rise in popularity with new outlets catering for these markets very much on the rise. Healthy food is becoming fun and innovative.
- o Beverages including activated charcoal and herbal extracts .i.e. functional nutrition, food as medicine.



### **Wellness Tourism:**

Wellness Tourism continues to increase in popularity (estimated by well-known industry report in 2013 at \$494 billion market)

- o Increased group Spa bookings e.g. ladies afternoon out.
- o Corporate group bookings e.g. company sales meetings / events
- o Wild swimming e.g. pool at London's Kings Cross development
- o Wellness festivals
- o Meditation silent retreats and other wellness retreats

### **Wellness Communities or Real Estate:**

Not aware of any wellness communities / real estate in the UK.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

I think it's really hard to find something for the UK!!

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Population as a whole are miseducated on health and wellness both from industry (food, pharmaceutical) and governmental sources. Food can be a medicine or a poison. Pharmaceuticals treat symptoms only and frequently cause an overall deterioration in health due to side effects. General public and policy makers strongly influenced by food and pharmaceutical industries driving the "sickness economy"

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness

- ALL encompassing: the physical and metaphysical (mental/ physical health)
- Wellness is making a physiological and spiritual change to an individual in the spa world.
- Physical health can be improved in spas with so many treatments/ technologies, for example, ones that help to physically remove inflammation, ROS, Oedema, pain, etc.
- Mental health can in many ways; to name but a few examples: massages that passively deliver meditation and do not just rely on "mindfulness" as too many people find this hard or need lots of practise to meditate; therapy like conscious engineering/ lucid dreaming that is medically proven to treat anxiety and manage phobias; healing: helping people in "intuitive healing" understanding and reading energies and vibrations, etc.

- By increasing services in, and delivering both physical and mental healing, spas will naturally deliver wellness.

Wellbeing

- I believe wellbeing as a word is weaker, less physical and more in line with what MOST spas offer now.

- It's not all encompassing

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# Industry Briefing Papers 2016

## EUROPE: UNITED KINGDOM

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Tailor-made treatments, bespoke to the individual, mindfulness, genetics, vitamin infusion, short effective treatments for the time poor.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Understanding who your clients are and what their needs are.

#### **Beauty:**

NA

#### **Fitness:**

NA

#### **Nutrition:**

Clean eating, vitamin rich diets

#### **Wellness Tourism:**

NA

#### **Wellness Communities or Real Estate:**

NA

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Facials and Skincare

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Deal sites, changing the perception from a pamper treat to treatments becoming a lifestyle choice.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Generally, the word wellness is more widely used, and is used in reference to a holistic approach, whereas well-being is used in reference to your health.

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# Industry Briefing Papers 2016

## EUROPE: UNITED KINGDOM

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

What makes the press/public sit up and take notice are activities that encourage the consumer to be social. I live in London, work is constant and people can feel isolated from face value conversation and interaction. There is strong support for wellness facilities that want to keep things social and fun, whilst also promoting health, education and longevity. It gives people an option of being able to have fun and enjoy others company, whilst also being to look after themselves and those they care about

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

The personalisation of services and retraining of therapists to ensure we can adapt services for guests with chronic health conditions, which used to be taboo in the spa industry.

#### **Beauty:**

Middle ground is no longer desirable, go organic or go medical.

#### **Fitness:**

Social interaction and innovative, fun activities that push physical limit boundaries.

#### **Nutrition:**

Mass integration of organic ingredients into daily life of normal working people.

#### **Wellness Tourism:**

How can I travel and continue with all the innovative fitness activities that inspire me to keep fit?

### Wellness Communities or Real Estate:

The development is only for a very high income group, it needs to be more accessible to the younger community, a generation more lifestyle aware than ever before, but not in a position to afford it.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Britain contributes the traditional English experience, which I believe it does so well in countryside destination spas, but is what is quite special is brand development. Britain is home to Elemis and ESPA – the world’s leading spa brands on land and at sea, therefore having a massive global impact on spa standardization; design and training. What is also encouraging is the development of local British Spa brands that are at the cutting edge of organic ingredient research and how this new wave of product experiences are filtrating the market – e.g. Soveral; Dr Jacksons Natural Products. Britain really has been a fantastic centre of innovation for the spa and wellness industry.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Consumer awareness. Spa & Wellness offerings are evolving so rapidly and current classifications are outdated. Facilities must be profitable and in dense urban areas the cost of doing so means sacrifices to what the consumer would understand as ‘spa facility essentials’. ‘Luxury’ does not necessary mean ‘everything’ and it is this lack of public education that cannot determine the difference.

Opinion ransom: I am an avid supporter of constructive and fair feedback, but hospitality is still in a mind-set where they are brand protective and it is highly discouraged to openly challenge guests on incorrect feedback when they are just looking for something for free and essentially trolling businesses that have tried their best to look after them. We are guest service and we have a responsibility to convert people’s attitudes, but guests take full advantage of this. In all public services it is illegal to abuse/be rude to staff and in the spa and wellness industry. I think protection and support in this area for the wellness and spa community is going to be very important.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Firstly, there is clearly confusion on this across the board. What I do notice is that guests seem naturally drawn to the word well-being, which is a great deal more self-explanatory, holistic and appealing then the word wellness. Wellness is contemporary and personally, sounds more superficial than then word well-being, which sounds more meaningful, and that one is well on a full and deeper level.



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# Industry Briefing Papers 2016

## EUROPE: UNITED KINGDOM

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

It seems to be that the news is more about the mind than the body and that we are going back to more traditional reasons for visiting a spa. In the past the rise of health farms which was just as much about food and fitness as spa treatments has now returned in the form of more sophisticated spas with various heat experiences, outside spaces, non-revenue areas which can offer the whole package.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

The physical look of the spa and how it makes you feel to enhance the customer journey and how the guest feels.

#### **Beauty:**

Despite more advanced electrical equipment beauty still comes from within.

#### **Fitness:**

Yoga and outside fitness, being amongst nature for physical and mental wellbeing.

#### **Nutrition:**

There is much more awareness about food, an increase in those who are gluten free, dairy free and aware of fodmaps and more focus on the fact that your gut is your second brain so by looking after it you will improve your physical and mental health.

#### **Wellness Tourism:**

Spas are becoming an integral part of hotels now, offering spa breaks to include relaxation, nutrition, exercise and mindfulness.

#### **Wellness Communities or Real Estate:**

Wellness communities seem quite rare however private homes do have more awareness of health and welfare but in the UK it is still a slow growth.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Great Britain has been the origin of some very successful product brands which has inspired others to follow. The back to the future theme is fitting because in the UK there has been a trend to go back to more environmentally friendly ways. Not just in spas but on the high street, there are more charity shops, recycling enterprises and the population is generally more consumer savvy looking for more information about where the items they use are from. The farm to table movement ie where does your food come from is now being copied in the spa industry with guests wanting to know more about the products being used and where the ingredients are from. This has encouraged more businesses to look into their own brand of product so that they can be confident about the treatments they offer. The UK is now offering more unique and niche brands focusing on quality and the experience guests receive which is more of a traditional route for the industry.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

I think a big challenge in this country is to make businesses understand the importance of looking after their employees wellbeing. Corporate wellness should be more prevalent amongst all types of business. The government could help with financing this to make the workforce more engaged and productive.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

I consider wellness to be more about being in the present and meaning not the absence of illness but rather a state of physical, mental and psychological happiness at that time whereas wellbeing is more an ongoing state incorporated into daily life to achieve a state of wellness.

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# Industry Briefing Papers 2016

## EUROPE: UNITED KINGDOM

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Here in the UK we have found that people are going back to basics – from eating more natural and less processed foods, cutting down on sugar, using organic products in both food and beauty products and learning to balance the work/family time better.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

People are incorporating spa rituals into their daily gym routine and having a sauna or steam and cold showers every day after the gym or work as a result of being better educated about wellness and wellbeing.

#### **Beauty:**

Organic beauty is more popular than ever with products such as seaweed being utilized more as it has anti-oxidants and helps with anti-ageing.

#### **Fitness:**

HIIT training is more widespread now as people understand the benefits more and cycling, running and bootcamps, including the mud based obstacle courses, are very popular. Fitness technology has taken off in a big way too with fitness apps a must on every smartphone to monitor steps, calorie burning etc.

#### **Nutrition:**

There is more organic food production in the UK now as people understand more about the health benefits and the effects of nutrients on the body and how it can help their immune systems.

#### **Wellness Tourism:**

Wellness is now starting from the beginning of your journey – airports and planes having massage and relaxation areas as well as spa's in the Lounges.

### **Wellness Communities or Real Estate:**

Many high end residential apartments have wellness facilities and gyms built within the block incorporating saunas, steam rooms and other thermal cabins, with each development vying to be better to secure more investment.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The UK is getting back to basics to educate the population on the importance of physical and mental wellbeing in everyday life. It is providing this from an early age and our recent Olympic and Paralympic successes show how young people have been encouraged to take up athletics, cycling, gymnastics etc to get fit and healthy. Education is key and has led to a growth in local clubs and gyms where experts can help people develop their fitness levels.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Ironically our biggest challenge is also about educating the population about the benefits of wellness and how important it is to continue incorporating this into their daily routines, especially on the hot/cold thermal treatments. However, people are starting to realise the benefits more and hopefully this challenge will recede with the growth of the clubs and gyms mentioned above. We have to help people understand that fitness is not just for the elite athletes or the rich. It is for everybody.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness: More related to products and spa areas.

Wellbeing: Making a deliberate, conscious decision to improve a physical state and attitude.

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# Industry Briefing Papers 2016

## NORTH AMERICA: CANADA

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

As a general rule, Canadians have always been great to travel. Each winter, as the temperatures plummet in the colder months, we historically flock south. Known in the southern regions as “snow birds”, Canadians contribute significantly to the international tourism market, most especially in the southern United States, Caribbean, and more recently in Central America (with an increased number of direct flights from key Canadian cities and airlines servicing this region). With this being said, travel outside the country that doesn’t include the same access to health care and coverage provided at home, is becoming more of an issue and deterrent to traveling abroad.

This is particularly relevant for the aging population and also in an era of public health concerns such as Zika. As a result, and also in response to a growing movement towards the concept of “stay-cations”, we are seeing great growth in both the quality and availability of hotels and resorts within Canada with a strong spa and wellness presence. In key Canadian cities such as Vancouver, Montreal and Toronto, we have seen great growth in both the luxury resort and boutique hotel market. Take Toronto for example: Within a 20-month period between February 2011 and October 2012, we saw the opening of The Ritz-Carlon Toronto, the Shangri-La Toronto, Trump Toronto, and the opening of the new Four Seasons Hotel and Residences. All four of these properties have extensive spa footprints which have changed the face of the industry in the city.

In resort towns in the outskirts of major city centres across the country we are seeing great growth too. Many properties that were previously seasonal, and only open during the peak summer months, are now transitioning towards year round operations, with almost all featuring spa and wellness programs. Ski destinations throughout British Columbia, Alberta, Ontario and Quebec have long been world-renowned for their skiing. Proudly, they are now becoming known as world-renowned wellness destinations too. Nordic-inspired Spas in spectacular locations that feature thermal baths and extensive amenity programs are on the rise and are a perfect complement to the abundance of adventure and outdoor activities available.



**2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

**Spas:**

The quality of education and hand's-on training received by Massage Therapists in Canada is very strong. Most health care plans include complete coverage or partial re-imbursement for these services.

**Beauty:**

Beauty is both personal and universal in Canada. Such a multi-cultural nation, you can access all the latest beauty trends and offerings in all key city centres.

**Fitness:**

Finally! We are beginning to move in a better direction here – outdoor walking and biking paths in cities, effective and affordable city bike share programs are more readily available, modern and innovative studios with diverse offerings such as barre, capoeira, reformer-based programs, dance, yoga, pilates, etc..!

**Nutrition:**

Phenomenal movement towards “Eat Globally, Source Locally”. Great availability of farm-to-table options & home-delivery of local produce.

**Wellness Tourism:**

Concept of “stay-cations” and advancement of spa and wellness inclusions as noted above.

**Wellness Communities or Real Estate:**

There is tremendous un-tapped opportunity here.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Overall, I would say our approach to health care – from both a quality and accessibility perspective – is a great contribution. The health care system in Canada is progressive and the concept of holistic medicine has been embraced. Health care is publicly funded for essential services. In addition, most corporate health insurance plans include annual coverage for a variety of modalities such as Naturopathic Medicine, Traditional Chinese Medicine, Acupuncture, and Massage Therapy by a registered provider.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Certainly many great challenges we face are a result of urbanization and growing populations in our major city centres which are taxing on our facilities and resources. Currently reactive, we need to become much more proactive in our approach to planning for a growing demand.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

If anything, I think “wellness” is now more commonly understood as being associated with an industry whereas “well-being” is more commonly understood as being associated with the individual. We need both!

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# Industry Briefing Papers 2016

## NORTH AMERICA: MEXICO

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

In Mexico, there is increasing awareness of wellness and well-being. More people are everyday making changes in their lives in order to have healthier, fuller and more equilibrated life.

Wellness is shifting from being a touristic activity to an everyday lifestyle. We can see changes in every sector: from increased awareness of workplace wellness, nutrition, fitness or mindfulness, everyone wants to be part of this movement.

The government is very involved in changing the way people live and offer many programs to help them achieve higher wellness levels and decrease health problems.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

There is a shift from traditional spas to spas that want to be more inclusive of wellness living.

#### **Beauty:**

We are moving back to pre-hispanic ingredients and techniques that are now combined with modern design, technology and knowledge.

#### **Fitness:**

Everyone is aware of the need to exercise. In all social classes, we are exercising more. It is incredible to see the increasing number of people who shifted from driving to biking in the cities. The public gyms in public parks are also increasing very rapidly.

#### **Nutrition:**

The government has taken very important measures on this matter. They banned the sale of soft drinks and candies in schools, no salt on the tables in restaurants, they increased taxes on products that have a high sugar content etc.

Moreover, there is an increasing choice of low fat, low sugar, vegetarian and gluten free options in restaurants and supermarkets that show the tendency of conscious eating.

#### **Wellness Tourism:**

Medical tourism is highly increasing as investors have realized the great opportunities that Mexico can offer: its proximity to the US, the lower cost of medical treatments, the beauty of the country and the perfect all year long weather that many regions in Mexico offer.

#### **Wellness Communities or Real Estate:**

Although full wellness and holistic community developments are still very rare, real estate developers are increasingly worried about including wellness facilities in residential developments.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Mexico has always had a very strong sense of preserving ancient traditions. From Temazcales to all the knowledge that is passed on generation to generation in terms of herbal medicine, Mexico loves to protect and promote its pre-hispanic traditions.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

I feel the biggest challenge that Mexico faces when it comes to wellness economy, is to have “wellness for all”. There is a large gap between social classes in the country and it is never easy to make wellness available for those who are the less fortunate. It is important, and difficult, to increase health care, give education, better nutrition, and well-being to rural communities that are isolated and do not have access to everything we often give for granted.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

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# Industry Briefing Papers 2016

## NORTH AMERICA: MEXICO

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

The biggest growth area in wellness and wellness travel in Mexico is certainly in the area of Wellness Retreats. Retreats focusing on anything ranging from yoga, meditation, stand up paddle boarding, dance, weight loss, fitness and more. There is now a considerable amount of press on these retreats and many blogs, websites etc. dedicated to this industry segment.

Wellness suites in hotels are also making the news, with many large and small hotel companies investing in wellness elements to add a more healthy experience to their guests' stay.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

More than massage – the inclusion of a wider variety of services and experiences and a focus on customization and guest interaction.

#### **Beauty:**

New technology including multi purpose makeup/treatment/suncare all in one products.

#### **Fitness:**

A wider variety of activities available and gym equipment that can synch with wearable tech to track fitness and activity.

#### **Nutrition:**

Better knowledge of healthy practices and sources of food made known to the consumer (i.e. Organic / non GMO etc), also an increase in restaurants serving specific cuisine such as vegan, gluten-free options (whatever your views on this!) etc.

**Wellness Tourism:**

Retreats and complete wellness experiences are becoming ever more popular and as such I believe the traditional 'all-inclusive holiday of indulgence' will soon take up a smaller market share.

**Wellness Communities or Real Estate:**

More focus on long term solutions for communities and housing with a focus on wellness, i.e. accessibility, medical care, etc.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Certainly Mexico is poised to become one of the leaders in wellness tourism due to the climate, environment, exchange rate/currency value and proximity to the population of US and Canada who will be a huge market segment for this type of travel.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Corruption at all levels of government and media coverage of cartel related violence (often blown out of proportion and used as a scare tactic in US & Canada to discourage visits to Mexico, which is largely a very safe country.)

**5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of “wellness” and “well-being” in your country.**

To me wellness indicates the focus on good health and healthy practices while well-being indicates a state of health at a point in time, although they are certainly closely related and interlinked!

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

A growing focus on our personal environment (body and mind) coupled with a growing awareness of global environmental distress is shaping our industry in subtle, but meaningful ways - quality of food, touch, green practices, meditation and community - all gently remind us of our fundamental connection with others and the planet itself.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Spas are becoming ever more techno-gadget oriented with equipment and facilities often minimizing interaction with associates.

#### **Beauty:**

While still a major menu theme, there is a growing demand for natural, non-invasive approaches as per the holistic esthetic approach.

#### **Fitness:**

Fun, exotic/romantic dance ( e.g., tango and adventure seeking activities ) are proving to be viable options for the rigid disciplines of the workout room.

#### **Nutrition:**

Whole, fresh and sourced locally plus cold pressed juices available on demand in a growing number of properties.

#### **Wellness Tourism:**

Staying closer to home, guests are seeking progressive programs that truly make a difference ( e.g., customized treatment plans and organic kitchen gardens often a major draw.)

**Wellness Communities or Real Estate:**

Although full wellness and holistic community developments are still very rare, real estate developers are increasingly worried about including wellness facilities in residential developments.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Convenient, healthy food - A growing awareness of food toxicity has given rise to juice bars, raw food, alternative cafes and healthy food chains in most urban, populated areas.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Making a commitment to train and educate our practitioners. Generating upwards to 80% of all spa revenue, the quality and integrity of our menu services is the single most important component of operations and is the value that will attract and grow an appreciative clientele.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Well-being - The desired state.

Wellness - Pursuit of the desired state, which incorporates the active ingredients of well-being (exercise, diet, meaning and purpose).

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Many articles continue to appear in top US magazines and papers such as: 7 Wellness Travel Trends to Watch in 2016, which hit the US News and World Report earlier this year. The article actually quoted the Global Wellness Institute statistics. The insight from this article, which I think is particularly relevant, is: "Once marketed at high-end spas, wellness services are ever-expanding in hotels, airports and leisure destinations across the globe. And with a growing number of health-focused initiatives, it probably comes as no surprise that interest in wellness tourism is steadily climbing."

What I am really loving is this notion of democratization of wellness and that it is no longer an elite proposition. Yes, there are plenty of headlines touting the latest wellness destinations and global tourism options, however, this grass roots interest in wellness at home is exciting and a phenomenon that requires serious consideration. I believe this renewed interest in wellness is rooted in two interrelated and yet diametrically opposite trends: (1) Demanding Hyperdigital Lifestyles and (2) the Search for Meaning and Conscious Connection.

In the late 1980's when I was finishing my master's in business and organization behavior from Loyola University in Chicago, I was fascinated by the research of several great thinkers in the area of Sociotechnical Systems - (STS) in organizational development is an approach to complex organizational work design that recognizes the interaction between people and technology in workplaces. The term also refers to the interaction between society's complex infrastructures and human behavior. In the 80's, I predicted technology would one day outpace the human capacity to adapt to change. Today, we see an increasing number of stress-related disorders and disease as humans' attempt to cope with this new hyperdigital reality. At the same time, organic systems will always find ways to recalibrate and return to a "natural" state of equilibrium. I think people are naturally doing that today. What is interesting though, is that the very technology that keeps us up at night is the key to fostering even more profound connections around the globe and a world consciousness that may have taken centuries to evolve prior to the introduction of cellular technologies. In short, I believe the world is at the threshold of one of the most spectacular eras of our time - an era where personal, interpersonal, intercultural

and global well-being can be the common ground where we finally relate, overcome ideological differences and foster a new consciousness to save our planet and its earthly inhabitants.

**2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

**Spas:**

Spas are leading the way in wellness programming and helping lodging on and other tourism sectors get on board.

**Beauty:**

When someone looks good, they feel good, and when they feel good, they achieve better results in life, at home and at work. It is time beauty explores its contribution to wellness.

**Fitness:**

Fitness leads the way in integrating technology into a well lifestyle and pushes other sectors to do the same.

**Nutrition:**

The physical aspects of wellness – fitness and nutrition easily connect. Yet in the US, nutrition seems to lag the world as statistically we remain the least healthy and educated omnivores on the planet.

**Wellness Tourism:**

The blend of eco and wellness tourism continues. Hurried lifestyles prompt a resurgence of the “weekend wellness warrior” and “episodic experiential wellness” – short wellness bursts planned over a period of time.

**Wellness Communities or Real Estate:**

I love to see this trend which is ahead of its time, but which will be a leading integrator of global wellness in the not-so-distant future.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Integration of wellness into fast-paced and urban lifestyles – community gardens, yoga studios, healing arts day spas, the resurgence of wellness in the workplace, free aerobics/yoga in the park over lunch hours, popup food trucks offering seasonally and local...and the many other purveyors of “entrepreneurial convenience goods and services.”

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

We have not grappled with the fact that the era of “doing more with less” is killing our workforces’ capacity to thrive, contribute and make meaningful and productive contributions to the organizations within which we work.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

I don’t see a distinction between the two. In keeping with the theme: Back to the Future, wellness holds the key to our historical roots in the movement, whereas well-being is the contemporary nomenclature which doesn’t carry the same tired stigma of wellness. Well-being is a reiteration to which today’s consumer and participant more easily relates.

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Last year, the Global Wellness Summit identified the top shifts in wellness. One of those shifts was a movement towards mandatory wellness, by institutions and governments alike. Mandatory wellness must be affordable and accessible in order to work. The Harvard Business Review (2016) published yet another article about how America can't afford not to keep people well. I've spent the last eight years as an executive with the nation's largest Federally Qualified Health Center. Since 2009, the US health care system has been undergoing massive disruptions. Some would argue that the business community is suffering, others would say that new opportunities for industry have been created. 2016 has been a record-breaking year in mergers and acquisitions in the healthcare industry (Healthcare Finance News) as meaningful use drives the new paradigm of value-based care.

Meaningful use and value-based care are just fancy words for wellness. The rise in mergers and acquisitions has a direct correlation to the US healthcare industry's lack of expertise in 1) how to keep people well and 2) how to prove it using data and analytics. Both of these shortfalls, offer opportunities for wellness experts to fill a growing demand for wellness in America.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

Spas are increasingly embracing the intersection of integrative medicine, beauty and wellness.

#### Beauty:

Beauty can be oppressive and expanding the definition of beauty is imperative in today's world. For example, famed musical artist, Alicia Keys' choice to promote her natural beauty and not to wear make-up, has sparked much needed dialogue around this issue.



**Fitness:**

The rise of 'life coaching' in this field will help increase sustainable practices, as what has been lacking is more emphasis on behavioral change models.

**Nutrition:**

There is a rising consciousness about the benefits of a plant-based diet and the inter-connectedness of what we eat to environmental and social injustices globally.

**Wellness Tourism:**

As wellness tourism has declined in certain parts of the world due to fear, this has created opportunities for US wellness tourism to create new and interesting experiences for people to patronize here at home.

**Wellness Communities or Real Estate:**

Delos is making real headway through its Well Building Standard, which will take the expectations set by LEED to a whole different level of sustainability and responsibility.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Our ability to innovate and find solutions. The American healthcare industry has a huge demand for wellness and a short supply. As this demand increases there are significant opportunities to provide solutions to these institutions, large and small. Whether it's Delos' model of creating well spaces and certifications or the possibility of outsourcing Weight Watchers to supply wrap-around services that help keep patient members well, innovation will pay.

Wellness can no longer be a luxury in the United States. Obamacare has effectively made it a right. America has been on the forefront of workplace wellness for decades and although the progress in that regard has been incremental, the demand for affordable and effective wellness programs continues to grow. Half of Americans earn less than \$50,000 annually and over 14% are still living in poverty, and they all want to be healthier. The US government through Medicaid and Medicare along with private insurers are willing to pay individuals and institutions money to help them figure out how.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

As the world population grows and poverty continues, who will equalize this industry and disrupt the notion that wellness isn't affordable or accessible? What will be the Uber or Airbnb of wellness? America is on the right path. Universal healthcare is not new, but universal wellness is, and whoever discovers the algorithm for that quandary, will go down in the annals of history as the person who leveled a very uneven playing field. And, not unlike, Uber or Airbnb, there may be some backlash, but the benefits will far outweigh the costs.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

I believe the terms are clearly inter-changeable. But, as the notion of wellness continues to transform from basic physical activity and nutrition to financial, mental and spiritual well-being, well-being then becomes a natural advancement of the term wellness. Well-being personalizes wellness and brings a wholeness to the idea that wellness is something that a well ‘being’ should embody. In the healthcare industry, there is a movement towards patient-centered care, which puts ‘beings’ at the helm, as opposed to ideologies or institutions.

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

The US is slowly catching up to wellness potential by combining mind body services and activities with medically related services. While not entirely prevalent, it is making headway. We are also seeing an increase in asset managers who better understand, and strive for additional information about, the wellness industry in order to better serve guests with the delivery of well-being, while also educating the guest about well-being life choices.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Blending fitness activities into the spa component (spas including body motion into the overall relaxation opportunity).

#### **Beauty:**

Less is more!

#### **Fitness:**

Blending the spa activities into the fitness component (membership clubs adding wellness services).

#### **Nutrition:**

The education of the US consumer starting in our public schools with the introduction of healthful eating through the development of school gardens and nutritional education.

#### **Wellness Tourism:**

Identifying the guests who desire wellness services in an environment that inspires well-being.

## Wellness Communities or Real Estate:

Consumers want to live the well-being lifestyle, and continue to request education where they live, work and play.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Thermal springs are gaining popularity in the US and destinations with thermal wells are undergoing renovations by the dozens!

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The misunderstanding of wellness by both the industry and the consumer.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness is the adjective used to describe an activity, and well-being is the lifestyle one creates internally and externally. Well-being is your own feng shui, if you will.

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Epigenetics research is making its way into mainstream media. We now know that factors such as chemical exposure, sleep, nutrition, activity, stress, relationships, and perspective modify the epigenome. Understanding that making good decisions in these areas will result in positive gene expression, not just in our lifetime but for our future generations is hugely motivating.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

BodyMind treatments incorporating meditation into hands-on therapies in the spa environment are growing in popularity.

#### **Beauty:**

Consumers are starting to focus on transforming their internal environment through shifts in perspective. Joy manifests as radiance.

#### **Fitness:**

Fitness is becoming much more inclusive and attracting people interested in play and bonding rather than just a toned body.

#### **Nutrition:**

As our soils are rapidly becoming nutritionally void we will look towards sources of transdermal nutrition.

#### **Wellness Tourism:**

Travellers are ranking access to a variety of activities and fresh, healthy food as the highest priority when booking destinations.

### **Wellness Communities or Real Estate:**

Commercial wellness developments are popping up all over the country. Consumers are voting with their dollars and choosing to spend significant time and money with like-minded people.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Scroll through your Facebook or Instagram feed and you will find dozens of pictures of tasty acai bowls, stunning hikes, vigorous mud runs, and enviable spa days. Americans can be very competitive and even narcissistic at times. These seemingly negative traits have actually created a positive change as a whole as each user tries to top the next with how “well” they can be today. The advent of the “selfie movement” has absolutely helped to drive the wellness industry. The health and wellness industry ranks among the top 5 users of social media because this technology has proven quite effective in engaging users.

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Education is our biggest challenge in growing the wellness economy. The industry is growing rapidly with increased consumer demand but the number of qualified wellness providers is not increasing at the same rate. We need more distribution channels for authentic therapy training and a central regulating and certifying body to help consumers navigate the marketplace. The quality of the experience must be there for the client to receive a result but they often don’t know the right questions to ask when selecting a provider. A certification would help consumers locate these science-based programs.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Well-being is a state and can be used to refer to a collective group. Wellness is an approach and implies active engagement.

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Athleisure, juicing, wearables, healthy restaurant concepts, meditation + mindfulness, and transformational boutique fitness brands.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

Growth of the franchise low cost express mini spas in airports, malls, and suburbs has made spa experiences accessible and "everyday" exposing the industry to a wider market.

#### Beauty:

Innovation centers on high tech beauty devices, highly active products and peels, and hair color for home self-care so that consumers everywhere have access to transformative beauty regimes.

#### Fitness:

The fitness industry growth occurred in the boutique fitness studio sector, but this sector now finds itself immersed in a digital middleman economy and in 2016, is in the midst of massive disruption.

#### Nutrition:

Food is nutrition. But today, healthy food is also delicious, sexy, accessible, and fashionable. Vegan, vegetarian, healthy recipes are now inventive and highly publicized--as sexy as yesterday's fancy French cuisine. Well food is in high growth mode—being distributed via the new healthy restaurant concepts, Juicing, and home delivery brands. There is really no excuse anymore.

#### Wellness Communities or Real Estate:

The demand for wellbeing living is accelerating and developers are all seeking to infuse wellness into hospitality and residential living projects. We are seeing this as an enormous growth avenue for exhale.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Boutique fitness

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Less than 20% of the US population is flourishing. The rest are just getting by, living lives of over stimulation, under nourished, multi-tasking, digital addiction, and physical illness. We are still in the dark ages with respect to the cultural mindset and value that is placed on mindfulness, family, time, relaxation, connection, and positive emotion. I think back to when cigarette smoking was fashionable and ever-present in offices, trains, cars, and restaurants. How can we shift the cultural value set so that it is fashionable to be present, mindful, grateful, and connect socially? Until we can shift this paradigm we will continue to boast epidemic obesity, illness, and unhappiness.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

I have always associated the concept of wellness with preventative medicine, and medical or prescriptive approaches to addressing health issues. I have associated wellbeing with the state or benefit derived from a well lifestyle.

It may be that the two terms are beginning to blend and are interchangeable.

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Functional Medicine continues to grow, as do spa services related to medical office and hospital care, most notably within cancer treatment centers and women's' health offices.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Collaborative efforts between spas and conventional medical centers are slowly advancing.

#### **Beauty:**

Growing awareness by consumers that not all beauty products are healthy.

#### **Fitness:**

Group fitness / cross-training remains extremely popular, and there remains growth in functional and outdoor fitness activities.

#### **Nutrition:**

Little has changed in the past year - Paleo and Gluten-free continue to rule, organics continue to grow as a percentage of supermarket shelving.

#### **Wellness Tourism:**

In combination with service / sustainability emphases, increased growth both among millennial and retirees.

#### **Wellness Communities or Real Estate:**

Great hope that these will be incubators for new health initiatives and research.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Efforts to control global warming and expand nature preserves (though they may be weakened in the future).

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Our political situation, and the fact that insurance does not reimburse for preventive strategies - it reimburses for intervention.

**5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness is a great term that to a large extent has been coopted to fit into corporate needs / employee health / HR and the Affordable Care Act. Well-being has both a personal and communal, even global, connotation that is preferable.

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Fitness Classes versus individual workouts – 45% of millennials who exercise regularly, do so in a class environment as opposed to 26% of exercisers aged over 55 (Nielsen Consumer Exercise Trends 2015). The fitness class will continue to see growth as it currently combines two lifestyle trends, i.e. Keeping fit and Socializing, the ‘trendy / buddy’ nature of Cross fit (7,000 gyms since the year 2000) and other similar styled extreme workouts is fuelling new ranges of clothing, footwear and accessories, Under Armour being a prime example. Current exercise trends are also heavily goal focused meaning that people are working out for a reason leading to the surge in popularity of Obstacle and Extreme races and events all over the U.S.

Vegan, Gluten Free and other specialty diets – While the search for Organic takes a back seat for a while to be replaced perhaps temporarily with the concepts of Farm to Table and Locavism (only eating food produced within 100miles of where you live) the increased interest in being Vegan or participating in a specific style of nutrition move forward and are currently a big influence in the market. The PETA Website declares 2016 as ‘The Year of the Vegan’ citing the rise in popularity of veganism and the mainstream sale of products such as seaweed, nutritional yeast, cashew cheese and vegan eggs. There is and continues to be a pushback on GMO products and recently a campaign was launched to sell so called ‘Ugly’ malformed produce which has until recently been regarded as unsellable and sent to landfill. The startup company Imperfect, deliver ugly produce direct to customers at significantly reduced prices, the nutrition value is the same the only thing which differs is the appearance of the fruit or vegetables.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

#### Spas:

The ever evolving search for talent, as the pool gets smaller and salaries and wage demands get higher the ability to make a profit while offering high service levels continues to be a developing challenge.



**Beauty:**

The move towards naturally based beauty products and an understanding by clients of the harmful effects of chemicals on their skin and potentially their genetic make-up.

**Nutrition:**

The interest level of Generation X and to some extent the millennials is rising in 'new' ways of consuming food and challenging the traditional nutritional models.

**Wellness Tourism:**

A growing interest to develop wellness communities: Given a similar rise in interest around the time of the last market crash, is this demonstrating a new trend in the market or another real estate bubble?

**Wellness Communities or Real Estate:**

Although full wellness and holistic community developments are still very rare, real estate developers are increasingly worried about including wellness facilities in residential developments.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The United States was at the core of the fitness revolution of the 70's and 80's. Think back to the home videos of Jane Fonda and Richard Simmons and the evolution of workout attire becoming a fashion statement as well as practical exercise wear through brands which are now world leaders. The images of beach living and fresh orange juice from California sold a lifestyle which spawned aerobic classes, stepping and numerous other fitness fads, some of which survive today and others which came and went.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

In new generations, disposable income levels are relatively low compared to previous generations and this may materially impact their propensity to purchase discretionary and often highly priced discretionary services. This carries over into the wider populations nutritional habits which can easily be swayed by a proliferation of food choices, many of which are unhealthy and widely available. This cycle leads to low energy, less exercise, lower motivation and in some cases depression.



**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness – Is used as a status symbol, often enjoyed only by those who can afford it.  
Well-being – Is the state that all should be entitled to and should be the key focus of policy makers to maximize including those elements that have no monetary base or entry point i.e. improving relationships, positive thinking, respect etc.

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

As an independent health practitioner I can't answer for the spa & wellness industry per se, but I do have a general sense of the health concerns, fears and confusions. Increasingly there is the battle between the use of pharmaceuticals for symptom relief and the natural health approach that aims to support core healing. This is often an uncomfortable fit in the UK whereas other countries, as I understand it, integrate these disciplines to work alongside each other. The big health concerns that I see repeatedly in my practice are visceral obesity, type 2 diabetes, oestrogen dominance-related issues and stress-related problems such as poor sleep and sugar cravings.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Although really not my area, from the limited work I do at Grayshott Health Spa, increasingly I am seeing the need for guidance and on-going support in maintaining good health practices. I believe that Health Coaching is something that will become much more established in the future, as yet is not really something that is established in the UK. The Gut Healing Regime I run at Grayshott Spa is proving hugely successful, not only in helping with digestive dysfunction but also the low sugar, high fat protocol is immensely helpful in blood glucose / insulin regulation and fat loss. Much of what we do in the Gut Health Regime is also essential for improved cognitive health and I believe this area is one that will be enormous in the future, as dementia and Alzheimer's becomes increasingly prevalent.

#### **Beauty:**

NA

#### **Fitness:**

True to the Back to the Future theme, natural movement is all the rage - using the body in ways that we would have done in primal times - pre gym times, rather than using isolating movements contrived through exercise equipment. Increasingly, High Intensity Interval Training focusing on resistance training rather than endurance is a

real positive especially for women who have formally shied away from resistance training.

**Nutrition:**

Such positive strides, again going back to a former way of eating, before high levels of processing were involved. Whether it's Paleo, Primal or simply non-processed, this is certainly the way forward. Also rejecting the focus on calories and low fat and embracing quality fats, high fibre and minimal sugars. We don't have much of a culture of fermented / live foods in the UK but thankfully there is now a real interest and far more availability of cultured foods.

**Wellness Tourism:**

NA

**Wellness Communities or Real Estate:**

NA

**3. Our theme this year is "Back to the Future." What do you feel is your country's most significant contribution to what is now a global wellness economy?**

Hard for me to comment, other than the field in which I am involved with ground breaking research in the role of the gut microbiome and its influence on genetic expression and brain health.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The NHS and private health insurance providers not supporting the use natural health practices.

**5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of "wellness" and "well-being" in your country.**

I consider "well-being" more of an old fashion term that is not really about optimal health, just not being unwell. "Wellness" feels a lot more proactive and aspirational.

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

**Spa:** Spa is no longer confined as a physical spa location but has taken on a more “coined term” and theme as its use has grown into broad sectors of business and has reached well beyond the once known “traditional spa”. From experiential destination spa tourism, apparel, technology, to even painting your walls with “spa” paint by Benjamin Moore, it’s a common daily encounter that is broadly a part of everyone’s life and an ever-growing necessity for many.

**Wellness:** There are a lot of companies offering genetic testing and others testing key epigenetic processes that are growing in number; engaging a growing percentage of the nation’s consumers. The continued study and application of epigenetics is rapidly progressing and newsworthy as there is a broader understanding that both the environment and individual lifestyle can also directly interact with the genome to influence epigenetic change. Our genes do not determine our health and wellbeing destiny just as our genetic influences can be modified at any time. Nutrition can alter the epigenetic state of the genome leading to dramatic deprogramming or reprogramming of large numbers of genes in metabolic pathways and physiological systems. A “nutritional intervention” is a possible way to “reprogram” the epigenome to promote health, wellness and prevent disease. I firmly believe that epigenetics will shape and form the future model of progressive countries healthcare systems.

**Wellness Travel:** tapping into a current lucrative 15 percent niche of global tourism, Virtuoso the leading international luxury and experiential travel agency has responded to the millions of wellness trips taken each year with their recent launch of The Virtuoso Wellness Zone exposing travel planners and advisors of the wellness travel consumers to some of the world’s best and most unique physical, mental, social well-being, spiritual healing travel experience.

**2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

**Spas:**

Advancements in technology, broadening the reach and engagement abilities making spa and one's personal wellbeing more easily accessible as well as affordable.

**Beauty:**

Ingestibles (supplements, food, drink) and topicals with focus on strengthening, repairing, or rebuilding from the inside out has slowed the demand for instant gratification products and services through greater consumer awareness and knowledge to inner beauty.

**Fitness:**

An experience no longer loathed. Though the waves on Lake Michigan may not be high enough to "hang ten", Chuan Spa, Chicago delivers to the rising popularity of experience driven fitness. Chuan Spa at The Langham Chicago encourages hotel guests and locals alike to unleash their inner surfer with a surf inspired workout. The Langham, Chicago is the first hotel in the city to offer surf style fitness equipment and programming as an amenity, and to invite participants to partake in SurfSet classes along the scenic Chicago River. Chuan's SurfSet Core Essentials classes provide the ultimate core workout, mimicking the core exercises of catching ocean waves. Aimed at getting away from the traditional workout by challenging the body in new ways, these classes combine yoga-inspired balance techniques, high-intensity & tempo cardio burn, and focused strength & definition building.

Consistent with traditional surf enthusiast's culture of protecting the ocean environment and the alignment of reef, sand, bathymetry, wind and weather; Chuan Spa Chicago relates this to "home" as the Chinese meaning of Chuan is flowing water. Chuan's connection and support being located along and offering classes overlooking the Chicago River is equally important to us to protect, preserve, keep clean this waterway as water is the source of life and is one of Traditional Chinese Medicines five elements aiding in rediscovering ones source and personal wellbeing.

**3. Our theme this year is "Back to the Future." What do you feel is your country's most significant contribution to what is now a global wellness economy?**

**"Wellness/ Spa On-Demand" Services & Offerings:** An abundance of stress and a scarcity of time are today's reality. The growing market of beauty and wellness on demand services and offerings "GrubHub Delivery Style" shows continued growth in education and consumer reach to wellness minded consumers and that they intend to feel great and look great no matter the constraints.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

Education...or lack thereof

One's childhood and how one grows up deeply shapes how individuals look at personal wellness; education on any level begins in the home. At the same time, the focused education and its reinforcement needs to be reinstated through strengthening our public education system, putting more qualified educators in class rooms; ultimately building positive health and wellness behaviors from an early age.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness is a gateway through a broad cross-industry category series of approaches (practices, products, services, locations, experiences, etc.) that serve as tools in the ever changing pursuit to find one's personal state of Well-Being.

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Despite more companies implementing wellness initiatives, the health of the workforce continues to decline. This is due to a number of contributing factors including an aging workforce, stagnant wages, high levels of stress, lack of adequate sleep, job insecurity, and emerging issues like RX drug abuse. These are some of the factors, but not all. In addition, as per the Gallup Survey, employee engagement has remained about the same, about 30% for employees who consider themselves engaged, despite a better economic outlook.

Companies and organizations are struggling to understand what and how to impact employee health, engagement and well-being. With thousands of “solutions” in the marketplace, it’s difficult to know if a solution is evidence-based and/or efficacy-based and if it is a good fit for their culture.

There is also a big disconnect between understanding the benefits of a healthier, more engaged workforce and the time and resources needed to support them. On average only 2% of a company’s total healthcare spend in the U.S. (SHRM 2010 Study) is allocated for preventive care/wellness. That translates into usually minimal or underfunded training, programs, tools and resources. And yet companies believe that healthier, engaged employees are key to meeting corporate goals.

What is fairly new is the integration between the environmental sustainability movement and the human sustainability movement. There is a growing understanding of how combining these two focuses can lead to better health and well-being for companies and communities. It’s promising to see a more multi-disciplinary approach to health and well-being starting to emerge.

As companies and communities understand the value of an integrated, interdisciplinary approach, they will have more success with their health and well-being initiatives.

**2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

**Spas:**

Catering to different demographics (Men, 55+, etc.)

**Beauty:**

More focus on healthy aging and natural beauty.

**Fitness:**

The connection between health (physical and mental), healthy aging and regular exercise.

**Nutrition:**

Growing education around the benefits of clean eating.

**Wellness Tourism:**

Vacations that focus on personal growth and renewal .

**Wellness Communities or Real Estate:**

Homes/communities built to support health and wellbeing, particularly for those 50 and older.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Solid research on the efficacy of mindfulness for better health and well-being.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The “we can handle it” attitude (i.e., tough it out), and the stigma that exists around seeking support for mental health/stress related issues.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

The word wellness tends to still be associated predominately with physical fitness and/or nutrition. Well-being is more of a holistic/whole-person approach that can include financial wellness, sense of purpose, connection to community, spiritual wellness, and mental health.

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# Industry Briefing Papers 2016

## NORTH AMERICA: UNITED STATES

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

Digital Detox is now a \$150M market inside of the \$14B wellness industry and people are spending top dollar to have experience-based services that allow them to unplug.

### 3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?

In the U.S. I think our most important contribution is nutrition, gut biome research, and food-based health.

### 4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?

Opulence and affluence. Too much of wellness is too expensive and traded too much as a luxury. More accessible, more affordable, more reliable outlets need to be available.

### 5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.

Wellness has become a generic term that rolls up corporate plans and personal routines into one large category. Well-Being seems to operate on a deeply personal and intuitive level where sense of self, self-care, happiness, laughter, and good relationships all contribute to the outcome.

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# Industry Briefing Papers 2016

## SOUTH AMERICA: BRAZIL

### **1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?**

Brazil is a traditionally “beauty-driven” country. The people has historically always cared about their beauty, particularly body. However, in the last 6-8 years the wellness concept has grown more effectively, especially in big cities, where there is an easier access to this related information, gyms, healthy nutrition centers, anti-aging clinics, and also day spas. This trend has pushed the appearance of different type of companies focusing its business in the various fields of wellness.

It has also fostered the day spas business. However, the development of spas may still be a little behind the other players in the wellness sector, especially because of Brazilian culture, which still creating a spa lifestyle.

### **2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:**

#### **Spas:**

Growing industry that still has a huge development potential.

#### **Beauty:**

Mature market which never sleeps, always delivering high results.

#### **Fitness:**

The future is now. The fitness industry is booming and totally part of Brazilian culture.

#### **Nutrition:**

Information and variety of products` offering is creating one of the largest markets within the wellness industry.

#### **Wellness Tourism:**

Still very focused on medical/esthetic surgeries.

### **Wellness Communities or Real Estate:**

Still in early stages, demanding investments and government incentives.

### **3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

The rich natural resources available in Brazil have stimulated the cosmetic industry to develop different types of products focused on natural herbs and earth elements, either seeking a nature appeal or a cure objective. Amazon and other Brazilian rain forests have brought global investments and studies, resulting in many important acknowledgements to the cosmetic industry (and therefore spa industry).

### **4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

The development of a wellness culture and lifestyle among Brazilian population is a natural process that is still happening and won’t stop so soon. However, the challenges that restricts the stronger and faster growth of this industry are mostly related to politics environment and government measures: (i) Restriction in the importation of global products and investments that would bring a higher level of offerings in this segment; (ii) Complicated and heavy tax laws; (iii) lack of public investments in this market; (iv) Challenging labour laws, etc.

### **5. While no answers are right or wrong, we would like to know what you feel is the difference - if any - between the terms/concepts of “wellness” and “well-being” in your country.**

In Portuguese we do not use these exact terms. However, I believe WELLNESS is a broad concept that comprises all the offerings, products, ideas and activities that helps the individual to achieve his/her WELL-BEING. WELL-BEING, on the other hand, is an estate of mind which can be achieved through WELLNESS, or through any other form or activity that makes the person to feel well.

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# Industry Briefing Papers 2016

## SOUTH AMERICA: BRAZIL

### 1. What is currently making news in your country when it comes to spa, wellness, wellness travel or well-being?

2016 has been a challenging year for Brazil. We have been facing a political and economical crisis impacting investment and new developments in all areas including Tourism and infrastructure needs.

With a 10% inflation per year, instable government and a decrease in economy growth, managers, business men and women, even freelancers tend to postpone vacations and retreats. This situation has also affected Brazilian economy with less money circulating in the market.

### 2. Please provide one sentence that describes what you think is the most important development in your country for each of the following wellness sectors:

**Spas:** Still a growing market, it has become a wish.

**Beauty:** This is still the majority focus of Brazilian population. From gym till chirurgical intervention. When it comes to beauty treatments Brazilian people are really careful and fascinated. Beauty treatments stores pop-up in all places, before only luxury for the upper class, now it's becoming more popular and affordable for middle class as well. Best investment for Brazil is focusing on esthetics in general.

**Fitness:** Cross-fit is the new big trend for almost 2 years, Ballet-fitness: modality that uses Ballet to build muscles and loose weight.

**Nutrition:** We shifted from Loosing weight diets to Healthy functional eating.

**Wellness Tourism:** It's still a small part of Brazilian Tourism, but it's a growing trend. It's still less than its full potential, but we start seeing all Hotels including spas, healthy nutrition to their offers.

**Wellness Communities or Real Estate:** Still not explored in Brazil.

**3. Our theme this year is “Back to the Future.” What do you feel is your country’s most significant contribution to what is now a global wellness economy?**

Brazil is a beauty driven country. We all want to look fabulous; men and women are driven by looks. So for our industry the main word is still: Beauty. And that goes for SPAs being a place to lose weight, to do beauty treatments being the big trend.

**4. What do you feel is the biggest challenge in your country when it comes to growing the wellness economy?**

It starts with stabilizing Brazil as an economy. Since 2008, after the big crash, Brazil strength came by borrowing money to the lower class so they start to consume more and making the wheel flow. But this strategy came to a dead point and if we don’t find a way to regain the right goals, building a solid political, economical and social structure the wellness industry will suffer.

The other challenge is really focusing on all the players in the Wellness industry to work together to build this industry in legal rights, in developing the demand and shifting Brazil as a main player in this world wide industry. If all players stay focused only on their business we will not have the strength and the influence to really develop Brazil as a wellness destination.

**5. While no answers are right or wrong, we would like to know what you feel is the difference – if any – between the terms/concepts of “wellness” and “well-being” in your country.**

Wellness: is a general name given for everything that can provide a better life, its used for healthy food, more exercise or even for spa treatments.

Well-being: is a term used for a state of mind. Not only health benefits, but mind and spirit benefits as well.

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