GLOBAL SPA & WELLNESS TRENDS
A PERSPECTIVE BEYOND THE SPA

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WHAT WE’LL COVER…

• What are the current key trends?
  – One megatrend

• What’s underlying them?

• How you can take advantage of them

• The implications for your business
TREND REPORT : SPAFINDER

• Ubër Trend: Your Mind is What Matters
  1. Healthy Hotels
  2. Wired Wellness
  3. Hot Springs
  4. Suspending Gravity (fitness)
  5. Ferocious Fitness
  6. ‘Natural’ Beauty Meets Social Media
  7. Aromatherapy: Scent with Intent
  8. Wellness Retreats Rise…& Urbanise
  9. Death & Spas
  10. Top 10 Surprising Spa Destinations

www.spafinder.com/trends2014
Why Wellness?
WHY WELLNESS IS BOOMING

Why Is Wellness Important To People, Business, & Government?

- Worldwide obesity has nearly doubled since 1980.
- Almost 10% of the world’s adult population has diabetes.
- Chronic disease is responsible for 60% of deaths.
- Over half the global business population has experienced an appreciable rise in workplace stress in recent years.
- From 2002 to 2020, health spending in OECD countries will more than triple, to $10 trillion.
- From 2000 to 2050, the proportion of the world’s population over 60 years will double.

Source: WHO, PWC, Regus
COST TO SOCIETY

• Next 20 years: the Big 4 will cost > US$ 30 trillion; 48% of global GDP in 2010.

• + Mental health conditions +US$ 16.1 trillion.

• Death and disability has economic impact on households, industries and societies:
  – Expenditure on health services
  – Lost income
  – Lost work productivity

• Millions of people pushed below the poverty line.

• Chronic disease is one of the leading threats to global economic growth (WEF).

THAILAND IS NO DIFFERENT…

Chronic Disease is a result of lifestyle, and is largely preventable.

Source: W.H.O., country profile – Thailand, 2014
THAILAND IS NO DIFFERENT…

Per capita total expenditure on health

Top 10 causes of death (2012)

Source: W.H.O.
“...millions of deaths can be averted and economic losses reduced by billions of dollars if added focus is put on prevention.”
the spa & wellness industry is uniquely positioned to meet this need.

“we are already doing it”

...are we?
I HOUR TREATMENT PER WEEK…

- Working: 34%
- Sleeping: 34%
- Leisure: 12%
- Eating: 8%
- Other: 11%
- Spa: 1%
not even the tip of the iceberg
HOW can we have more impact?
TRENDS IN SPA, 2015

- Products
- Customers
- Services
- Business
PRODUCTS
RESULTS-ORIENTED

Visible results demanded
• evidence-based marketing
• diagnostic tools

source: Nerium
MULTI-FUNCTIONAL

Before using Dr. Jart+

- dark circle

After using Dr. Jart+

- BB Blemish Balms
- CC Colour Correcting
- DD Dynamic Do-All / Daily Defence
- …what’s next?

How do we get more results from one product, in less time?
PERSONALISED SKINCARE

• Lab-personalised skin care could be worth $12.2 billion.
• Many brands tailor solutions for specific skin types, this is moving to a new level.
• U.K. survey:
  - 75% interested
  - 45% would travel to specialized labs for it.
  - Of those interested,
    - 54% would give blood, skin and hair samples
    - 51% would provide DNA swabs
    - 52% would attend a dermatologist consultation
    - Prepared to wait up to one month for product
    - 59% were prepared to pay a premium.
• Tailor according to allergies, genetics, nutrition, climate and sun exposure.

Source: Canadean, GCI magazine
PRODUCT–EQUIPMENT COMBO RETAIL

Cosmeceutical home care with DIY equipment
• micro-needling
• light therapy
• galvanic
• microcurrent
• slimming, etc.

Why come to your spa?
NATURAL SOPHISTICATION

Natural skincare brands less ‘rustic’

• cosmeceutical ingredients
• improved packaging
NUTRICEUTICALS

More than teas and vitamins
- new forms, e.g. ‘performance gels’
- innovative packaging

Especially…
- detox
- slimming
- hair, nails, skin strength
AUTHENTIC ORGANIC

More companies voluntarily certified
• adds credibility
• less ‘green-washing’
• clients’ more conscious of sustainability issues
CHRONIC DISEASE SPECIFIC

products formulated with needs of sufferers in mind

• Allpresan – foot moisturisers for Diabetics
  – Launching May
SERVICES
EXPRESS

Beauty maintenance, anti-stress
• express & treatments
• simultaneous treatments
• online booking
• e-queuing
• automatic rebooking
• smartphone charging stations
SPA ON THE GO

Mobile spas – convenience
• home
• office
• in traffic!
LIFESTYLE CONSULTATIONS

Clients know health and beauty are connected.
Seeking advice on:

- diet and nutrition
- exercise
- stress management / mindfulness
- sun damage
- stress
- sleep
- and lifestyle choices

Complementary therapists, but Spa staff need to know this, too!
SPECIALIST PACKAGES

Packaging of services to achieve specific results:

- Slimming
- Stress
- Menopause
- Insomnia
- Addiction

Partner with consultants
SPECIALIST SERVICES

Oncology Spas
• physical and emotional needs
• specialist trained estheticians
EMPOWER THROUGH EDUCATION

New knowledge & skills
• self-care
• healthy living
• creative arts
ENGAGING RELAXATION AREAS

Hydro and thermal
more ‘theatrical’
• beyond hydrotherapy
• marketing wow
• sensory journeys
• emotional impact
CHILDREN’S WELLNESS

A.W. Lake’s Hydro-Thermal Kid’s Spa concept for children ages 3 – 9+ yrs
CUSTOMERS
SOCIAL SPA-ING

Couples, ‘non-couples’, family, groups; men & women

• facilities
• ‘group-friendly’ packages
• service protocols
MEN

~47% of spa-goers
- men’s launches increased 70% in last 6 years
- not just massage:
- skin & hair care, manicures, Botox, scrubs
- primarily referred by women
Gen Y (age 25-34)
- 39% want anti-aging skincare
- 19% of 18-24 yo
- Botox for prevention and sculpting
  ~25% of Botox tx < 39 yo
MULTICULTURAL BEAUTY

Don’t judge by appearances

• Mixed ancestry & cosmetic enhancements

• creating risk in medi-spa, e.g. pigmentation

• Consultations & skin type diagnosis essential
BUSINESS
BUSINESS IS BACK

You can’t run a business without knowing about business!

• Spa management training
• Webinars, etc.
• Certification
• Mentoring
Online marketing is essential
- 3 billion new online users this year: most on mobile device
- content of value
- varied channels
- constant active presence
PRIVACY OF GUEST DATA

Guests like loyalty programs & tailored services, but...

- data protection is essential to trust
- backlash against
  - spam
  - list selling
- good ‘e-etiquette’ essential
THERAPIST UPSKILLING

New categories of therapists emerging
- degree courses
- Dermal Clinician: medi-spa specialist
- cost effective
- skin specialists
- licensing needs to catch up
STATUS = SUSTAINABILITY

New benchmark of status

- sustainable design (new)
- responsible sourcing
- reduce, re-use, recycle
- chemical-free operation
- organic products, F&B
- social responsibility
TRENDS THAT TAKE US DOWN THE WELLNESS RABBIT HOLE
WELLNESS SOLUTIONS: OPTIONS

Services

Online Solutions

Gadgets & Devices
REACH PEOPLE WHERE THEY ARE

HOME

WORK

MEDICAL/HOSPITAL

SCHOOL

ENTERTAINMENT

HOBBIES/SPORT

RETIREMENT

TOUCH POINTS
CORPORATE HEALTH

consulting • executive health assessments • onsite services • retreats • incentive programs • ergonomic/wellness design
CHILDREN’S WELLNESS

WELLNESS IN THE SCHOOLS

Give your child the key to Self-Confidence, Happiness and Success
WELLNESS FOR SENIORS

- fitness
- physiotherapy
- social engagement
- learning
- technology training
CREATE NEW HOBBIES / SPORTS

some new twists on yoga...
COMBINE WELLNESS WITH ENTERTAINMENT

- fitness ‘raves’
- virtual reality gaming using whole body
- healthy lifestyle festivals
- problem-solving adventure venues
ENERGY MEDICINE

Veritable energies (measurable)

- photodynamic therapy (LLLT)
- PEMF therapy (pulsed electromagnetic field)
- crystal / colour therapy
New wave of ‘mind-body’ opportunities

• biofeedback – training

• tDCS: transcranial direct current stimulation:
  – aids learning
  – mental disorders
  – eases pain
‘spaevidence.com’ has re-branded to Wellness.
Online Programs

5 steps to wellness

Step 1 – Assessment
Step 2 – Scores
Step 3 – Personal Wellness Action Plan
Step 4 – Tools to Support Your Wellness Action Plan
Step 5 – Resources for Ongoing Wellness
SUBSCRIPTION WEBSITES

[Image of the MyBrainSolutions website with various games and features for improving social skills and emotional identification.]
“After growing wildly for years, the field of computing appears to be reaching it’s infancy”

John Pierce
WEARABLE MONITORS

Monitor market to rise from $1.9bn in 2013 to US$2.8bn by 2018.

- heart rate, activity & energy expenditure, blood flow, respiration, galvanic skin response, hydration, blood glucose
- remotely monitored by self, team or health prof.
- Sell the technology
- Create services for continual improvement
MONITORS TO GO MAINSTREAM

Multifunctional

- fashion
- fusion with smartphone

Will increase use exponentially
NANOTECH MONITORS

Ingestible, implantable or stick on tattoo

- drug monitoring
- vital sign monitoring (heart rate, respiration)
- blood chemistry
- hormone responses
- transmits to doctor
- nanobots for repair
HEALTHY BUILDINGS

new standards in design & construction
SMART APPLIANCES

e.g. Smart Toilet

- monitors weight, BMI, blood pressure, collects samples
- charts blood sugar and temperature; diabetes, hormones
- future: lab-on-a-chip implants (on butt) for remote monitoring
PERFORMANCE IMPROVEMENT

Sewn into clothing or affixed to skin:

- movement, pressure, heart rate, temperature
- performance data: foot-strike, stride length, cadence
- feedback to mobile device
- ‘coaches’ improvement, e.g. counting rhythm

Heapsylon’s Sensoria smart socks
BRAIN SENSING & TRAINING

* translates brain activity into action
* wellness – biofeedback, stress-management, meditation • research •
  education – measures attention, effort, learning • gaming by thought control
MONITOR + ENHANCEMENT

e.g. Google Smart Lens

• aids vision
• camera
• monitors blood sugar
  – diabetes
  – fitness training
• new opportunities for visually impaired
• launch early 2015
ENHANCED HUMANITY

1st CYBATHLON
Zurich October 2015

• ‘new paralympics’
• powered prosthesis
• exoskeletons
• powered wheelchairs
• muscle stimulation
• brain interface
EARTHING

Healing through contact with the earth

• natural antioxidant
• anti-inflammatory
• pain relief

• use in-spa
• retail

IMPLICATIONS FOR YOUR SPA…

- Results-oriented services
- Results-based marketing
- Online presence & skills
- Training: technical & business
- Partnerships

- Continual education
- Continual innovation
- Get comfortable with technology
- Be selective
- Collaboration is key
thank you!