General trends for tourism planning

- Urbanisation
- Globalisation (demand for differentiation: branding USPs)
- Digitalisation
- Aging (longer age, disabilities, active aging)
- Healthy lifestyle as a norm (financing, vouchers, taxes)
- Environment and eco-conscious
- Collaboration and community involvement
- Planning / flexibility to react quickly
- Domestic / international markets (cultural differences and demands)
4WR: Wellness for Whom, Where and What? Wellness Tourism 2020

*Full Report* is prepared for Wellness Tourism Worldwide by Xellum Ltd. (Hungary) with the support from Global Spa and Wellness(USA).

www.globalspaandwellness.com
www.wellnesstourismworldwide.com
http://www.pc.ut.ee/et/terviseturismikonverents2013
Tourism provides 43% of all demand at spa and wellness facilities worldwide. IWSTM forecasts 3.7% growth of average revenue/customer for 2013 (with great regional variance!). Spas and wellness facilities catering for foreign travellers should be prepared for core clients. Note: demand is not uniform. Local customers, domestic and international tourists are very different! More at www.thetourismobservatory.org.

Popular Spa & Wellness Facilities for Domestic Tourists (world):
- Wellness hotels
- Eco-spas and wellness services
- Family-spa and wellness services

Australia:
1. Eco-spa/wellness facilities
2. Spas based on natural resources

Shift in Key Demand Segments (world):
- Primary Segment: Couples
- Secondary Segments: Single Women, Groups of Friends
- Tertiary Segments: Families with Children, Single Men, Mother & Daughter

First Timer Spa/Wellness Tourists (world):
- The Americas 2012/2011: +2.4%
- 2013/2012: +4.7%
- 2011: +1.9%
- 2012: +2.31%
- 2013: +2.93%

Key Elements of Brand Experience:
- Networking: 22%
- Accreditation: 50%
- Signature Treatment: 32%
- Market Position: 54%
- Wellness is about much more than just spas
- Ecological and green products and services
- Local assets (e.g. natural assets, traditions, rituals)
- Lifestyle and wider access, i.e. democratisation
- New, cross-over and fusion products and services
- Evidence-based wellness services
- Spirituality
- Segmentation and winning new segments
Wellness goes beyond relaxation and is a key element of lifestyle, which is a significant opportunity for the travel and tourism industry, since people following a wellness lifestyle will look for similar services when they are travelling.

Wellness tourism is more than spa tourism and includes healthy cuisine, specific fitness or body mind-spirit regimes, active-ageing or longevity programmes, learning, adventure, spiritual enlightenment, personal growth and has the ability to enhance lives.
Most popular 2013

- Beauty treatments (89%),
- Sport & fitness services (89%),
- Leisure and recreational spas (85%), and
- Spa & wellness resorts (83%).
- Evidence based services (78%),
- Wellness rituals (65%),
- Yoga and meditation (60%),
- Spa cruises (40%),
- Therapeutic recreation (38%),
- Nutritional and detox programmes (35%),
- Occupational/workplace/corporate wellness (19% of respondents reported unfamiliarity with the term, but there is a demand for the product),
- Thalassotherapy (19%),
- New Age (15%).
# Most popular 2020

<table>
<thead>
<tr>
<th>Products &amp; Services in 2020</th>
<th>Most important region</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Therapeutic Services</strong></td>
<td>Central-, Eastern Europe</td>
</tr>
<tr>
<td>Spiritual &amp; Holistic Services</td>
<td>Far East, South East Asia</td>
</tr>
<tr>
<td>Wellness Hotels ja Resort Spas</td>
<td>Africa, Central and South America, New Zealand, South Pacific</td>
</tr>
<tr>
<td><strong>Lifestyle-based Services</strong></td>
<td>Northern, Southern and Western Europe, North America</td>
</tr>
<tr>
<td>Region</td>
<td>Lifestyle</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Australia, New Zealand &amp; the South Pacific</td>
<td>▲</td>
</tr>
<tr>
<td>Africa</td>
<td></td>
</tr>
<tr>
<td>North &amp; Central America</td>
<td>▲</td>
</tr>
<tr>
<td>South America</td>
<td></td>
</tr>
<tr>
<td>Middle East</td>
<td></td>
</tr>
<tr>
<td>South-East Asia</td>
<td>▲</td>
</tr>
<tr>
<td>Far East</td>
<td>▲</td>
</tr>
<tr>
<td>Northern &amp; Western Europe</td>
<td>▲</td>
</tr>
<tr>
<td>Central &amp; Eastern Europe</td>
<td></td>
</tr>
<tr>
<td>Southern Europe</td>
<td>▲</td>
</tr>
</tbody>
</table>

Legend: ▲ – growth, • – stagnation, ▼ – decline; blank box indicates that the given product is not significant.
Optimal

Extraordinary

Memorable

Enchanting

Experience
Who Should Pay?
Country practices and approaches to paying for wellness-oriented travel differ greatly. According to the results of 4WR: Full Report, private health insurance is expected to play a more important role in providing policies that cover wellness travel.

State health insurance

<table>
<thead>
<tr>
<th>Not familiar with it</th>
<th>Very important</th>
<th>Important</th>
<th>Neutral</th>
<th>Not important</th>
<th>Not at all important</th>
</tr>
</thead>
</table>

0% 10% 20% 30% 40%

Interestingly, respondents participating in the 4WR survey revealed that in the field of medical tourism, the state should be playing a more significant role. There is a significant lack of information about how either private or state bodies can or should get involved in the financing of wellness tourism (e.g. in the form of holiday vouchers in Europe).

considering the financing of the health tourism industry, the most important player is the state health insurance in the area of medical tourism, and private health insurance has a dominant role in the wellness sector.
• Healthy Hotels
• The Mindfulness Massage
• Earthing
• Spa-Genomics...Telomeres and Beyond
• Authentic Ayurveda and Other Ancient Revivals
• Color Self-Expression
• Inclusive Wellness
• Label Conscious Fitness
• Men: From Barbers to "Brotox"
• Where the Jobs Are – traings, education programmes
Wellness-branded healthy hotels

- **Heavenly beds** (total blackout in rooms) and spas
- **Personalized menus and spa menus** (creating own juice by favourable indigrents, wellness concierges)
- **Spa treatments outside** (Earthing trend)
- **In rooms aromatherapy**, vitamin C-infused showers, wellness videos etc
- **Workouts gyms open 24 h**
- **In-room and free-to-borrow workout gear** (bicycles, weights, mp3 players, pedometres, running/walking tour kits with Ipods loaded with local tours and playlists)
- **Personal trainers** (fitness programs to continue workouts at home via the hotel website etc)
- **Carbon footprint and water usage** – eco concious (Langham hotels UK, Taj Hotels India, Six Senses Resorts & Spas in Asia, Kimpton U.S., Starwoords Eco-Chic Elements Hotels expanding to Canada, Germany and Oman)
- **Discounts upon healthy lifestyle** – 10 000 steps per day during vacation, get 50% off from your next room

- **Approachable, accessible and affordable** (shorter stays)
- **Hotel has a gym & spa** => gym & spa have hotel
- **Label-concious fitness**
INTERCONTINENTAL HOTELS GROUP will unveil its “all-wellness” brand **EVEN** in 2014 in New York City and expects to open 100 additional properties in its first five years. The brand revolves around pillars of healthy living—eating right, exercising, productivity and rest.
Founded by Madonna, in partnership with New Evolution Ventures in 2010, HARD CANDY FITNESS® is a global luxury fitness brand dedicated to providing a combination of entertainment and fitness that will help members feel strong and inspired.

SOULCYCLE® (New York and L.A.) combines inspirational coaching and music to deliver an intense full-body workout with a fun and energizing atmosphere. Fanatics can even wear apparel branded with SoulCycle’s...
The Mindfulness massage

A creative blend of two effective approaches, mindfulness and bodywork, the "Mindfulness Massage" is a more profound experience that can help people relax more deeply and quickly. Rather than lying on the massage table with a mind full of chatter from the stresses of the day, the Mindfulness Massage uses breath work and techniques such as body-scans etc.

- Spas as creativity labs *The Zen of Steve Jobs* and *Zennovation*
- Mindful fitness
Earthing

• Al fresco treatments and classes
• Barefoot spas
• Raw wilderness spas (pop up spas! Active outdoor activities)
• Extreme nature spa (floating spas near Amsterdam 2014, on trees not only yoga platforms but treatments)
• Urban nature (rooftop activities, treatments)
• Digital detox (discounts)

Think less background music with nature sounds and more real nature to help combat "Nature Deficit Disorder".
ISLA PALENQUE, AMBLE RESORTS (Panama) encourages guests to connect with nature by offering spa treatments in a shady palm grove.

At the TIERRA PATAGONIA HOTEL (Chile) guests are offered outdoor excursions and are surrounded by nature even when indoors.
Genomics and Spa (telomeres & beyond)

Humans have 30,000 genes and a three billion letter DNA code. The future of medicine is mining this information to identify breakthrough approaches to support a new age of predictive, personalized medicine grounded in each person’s unique genetic profile.

- Tests (23andME personal genomic service)
- Cheek swab tests
Authentic Ayurveda and Other Ancient Revivals

Aggressively-authentic and comprehensively executed global wellness experiences at spas with a distinctly ancient look, feel and language and a far more expansive, exotic menu of wellness traditions.

Best known is the 3,500-year-old, Indian-born Ayurveda, a complex medical system identifying imbalances in a person’s "doshas," and prescribing a personalized, detoxifying regime of diet change, exercise, meditation, massage and herbal medicine.
The GEO SPA AT FOUR SEASONS RESORT LANGKAWI (Indonesia) is an example of both the 2013 “Earthing” and “Ancient/Authentic” trends. Visitors to the spa experience the ancient energies of Langkawi’s UNESCO Geopark and bespoke natural treatments, inspired by the properties of nourishment, water, light and air. Langkawi’s Geopark is 550 million years old, the oldest land in Malaysia. The spa honors the healing stillness and indigenous benefits of a protected natural environment.
Located in a former nunnery, the NUN ASSISI RELAIS & SPA MUSEUM: ASSISI (Italy) offers a Roman bath circuit dug deep within a former first-century Roman amphitheater. The spa also includes a hammam and an ancient cistern.

A guest enjoys an “Ancient Massage” at the Nun Spa Museum.
Color: self-expression and nail art

New, haute "tattoo spas"; and nail art will continue to ascend with less bling and more nuanced textures and designs from 3D art to freehand mini-paintings.

• Lighting, brightening skin tone / control of skin tone
The popularity of nail art shows no sign of stopping as celebrity nail artists create freehand mini-paintings on each digit, and new inventions like mood-changing polishes are on the rise. First Lady Michelle Obama even flashed blue nails during the 2012 U.S. presidential campaign.

HEARTS NEW YORK SALON & YUKIE BEAUTY SALON in New York City offer clients designs by NailGrafx™ that use high-resolution technology to apply photographs and art to nails.
Spas & Hotels Get in on the Branding Act

Power Fit, Cardio Kickboxing, Yoga Booty Ballet, Sculpt and Abs, HIIT, Hydro Fit, Kick, Punch & Crunch, piloxing etc

• F.e. Golden Door (Encinitas, CA) has brought in celebrity dancer Karina Smirnoff to teach her branded DanceFIT program.

• Spas aren’t just retailers of new branded fitness trends, they can also be creators.

• In the future, don’t be surprised to see a major grocery store, drugstore chain or an airline launch a branded fitness program...
Questions?
Thank you for your attention!

info@visitsaaremaa.ee